Japan
Inbound tourism overview

**Annual visits***

<table>
<thead>
<tr>
<th>Year</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>237,000</td>
<td>243,000</td>
<td>225,000</td>
<td>222,000</td>
<td>194,000</td>
<td>246,000</td>
<td>247,000</td>
<td>247,000</td>
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</tr>
</tbody>
</table>

**Annual visitor spend***

<table>
<thead>
<tr>
<th>Year</th>
<th>2011</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
<th>2018</th>
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</thead>
<tbody>
<tr>
<td>£153 m</td>
<td>£306 m</td>
<td>£245 m</td>
<td>£213 m</td>
<td>£282 m</td>
<td>£245 m</td>
<td>£282 m</td>
<td>£306 m</td>
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</tbody>
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**Seasonal spread of travel*** (2018)

- Jan–Mar: 30%
- Apr–Jun: 21%
- Jul–Sep: 31%
- Oct–Dec: 18%

**Regional spread of travel*** (2016-2018)

- Japan: 55%
- All inbound markets: 45%

**Purpose of travel*** (2018)

- Holiday: 48%
- Business: 30%
- VFR**: 14%
- Misc: 4%
- Study: 4%

**Departure & destination airports*** (2018)

- London Heathrow
- Tokyo Haneda
- Tokyo Narita

**New route from Osaka started in April 2019**

**Average flight seats per week*** (2018)

- 7,750

**Average length of Holiday stay*** (2018)

- 6 nights

Sources: *International Passenger Survey (IPS), **Apex.
**Visit friends and/or relatives, ***direct, non-stopping flights only.
Japan Visitor profile

Key demographics: age* (2016-2018)

- 5% 7% (0-14)
- 13% 16-24
- 12% 25-34
- 21% 35-44
- 22% 45-54
- 23% 55-64
- 26% 65+
- 23% 65+

Key demographics: gender* (2016-2018)

- 52% 50% Male
- 48% 50% Female
- Holiday
- 45% 45% VFR
- 85% 80% Business
- 15% 20%

Travel companions* (2017)

- 50% 43% On their own
- 15% 28% Spouse/Partner
- 10% 5% With business colleague(s)
- 8% 9% With friends
- 6% 13% With other adult family members
- 7% 12% With children under 18

Holiday booking habits** (2016)

- Online
  - 58% 64%
- Face-to-face
  - 32% 27%

Planning and booking lead times** (2016)

- Start to think about holidays:
  - Over 6 months before trip: 48% 64%
- Decide to visit the UK:
  - 3-6 months before trip: 45% 38%
- Look at travel options/ prices:
  - 3-6 months before trip: 44% 37%
- Book their trip:
  - 3-6 months before trip: 37% 32%
  - 1-2 months before trip: 37% 28%

Top three activities in the UK* (2007-2017)

- Dining in restaurants
- Going shopping
- Visiting museums or art galleries

Top influences in choosing a holiday destination** (2016)

- 1. Travel guidebook
- 2. Travel agent or tour operator website
- 3. Accommodation provider/hotel website

Priority market segments & attributes

- Buzzseekers
  - Drawn to big cities, looking for a balance of famous sites vs new experiences, indulging vs challenging activities

- Culture Buffs
  - Image-conscious and food-lovers that look for relaxing, slow-paced holidays, visiting famous, iconic sites

77% of staying holidaymakers from Japan were “extremely likely” to recommend Britain in 2017*

Sources: *International Passenger Survey (IPS), % excluding unknown, ** VisitBritain/Ipsos 'Decisions and Influences' research, ***Kubi kalloo Japan All inbound markets Japan All inbound markets