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 consumers in Japan 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.
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Executive summary
Chapter summary

• In 2017, Japan lost 3 places in the world’s international tourism expenditure rankings, compared to 2016. However, after struggling between 2013 and 2015, the Japanese outbound market is forecast to grow, and should reach over 30 million overnight visits abroad by 2025. US$18.2 billion was spent overseas in 2017 by Japanese international travellers.

• Japan was the UK’s 28th largest source market in terms of both visits and visitor spending in 2017. Average spend per visit from Japan was 62% higher than the global average for all inbound visits to the UK in 2017.

• Half of visits from Japan to the UK in 2017 were made for holidays, and 30% for business. About 1-in-2 holiday visitors were visiting the UK for the first time.

• 1-in-3 Japanese visitors come to the UK in July-September; Japanese were less likely to visit between April and June.

• Most visits lasted seven nights or fewer. About 4-in-10 of the nights they spent in the UK were in a hotel or guest house.

• London is the favourite destination for visitors from Japan.

Source: UNWTO, Oxford Economics, International Passenger Survey by ONS
Chapter summary

- Top activities featuring in visits from Japan to the UK include dining in restaurants, shopping and visiting museums or art galleries.
- Many Japanese people decided to visit Britain because of its cultural attractions, because it was somewhere where English is spoken, somewhere new, and somewhere that is safe and secure.
- Almost 1-in-3 Japanese think a trip to Britain 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 holidays. Australia and the USA are usually the destinations that they would consider the ‘best place’ for delivering what they most want from a holiday.

In 2018, Japanese people ranked Britain 5th for its overall brand image, and tourism, and 4th for culture.

Source: Anholt Nation Brands Index 2018 (powered by Ipsos), International Passenger Survey by ONS, VisitBritain/IPSOS 2016, Arkenford 2013
3: Understanding the market

Chapter summary

• Japan had the world’s 4th largest economy by GDP in PPP terms in 2017, after China, the USA, and India. While GDP growth is below the global average, this is partly a result of demographics.

• 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 30% of the Japanese will be aged 65 years or over in 2030, compared to 12% in Asia in total. This has an impact on consumer and travel trends.

• Most Japanese book their trip to Britain online. When travel and accommodation for a trip to Britain are booked together as a package, Japanese visitors are more likely than the all-market average to make a booking face-to-face (32% vs 27%), or over the phone (10% vs 8%).

• Japanese visitors have longer lead-in times compared to most other inbound markets when arranging their trip to Britain.

• Japanese travellers are more likely than the average international visitor to be influenced by travel guidebooks when choosing their destination (44% vs 25%). However, they are less likely than the all-market average to visit a place featured in a movie, TV series or book.

• The Japanese are also less likely to use technology when overseas.

Chapter summary

• Most visitors from Japan came by plane to the UK (9-in-10 in 2017), but a minority came by Eurostar, which hints at a combined trip to the UK and continental Europe.

• Direct, non-stop seat capacity has halved in the last ten years. However, there was some good news in recent years, with an upward trend in the numbers of seats available on direct flights from Japan to the UK from 2015 to 2018. At the moment, all flights link Tokyo to London, and split quite equally between British Airways flights and local carriers (JAL – Japan Airlines – and ANA combined). British Airways will start a new route from Osaka for 2019.

• For long-haul travel most Japanese 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 the 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 Rdc 2016, International Passenger Survey by ONS
Chapter 1: Inbound market statistics
Chapter 1.1: Key statistics

Key insights

- In the last five years the Japanese outbound market has been struggling. Inbound visits to the UK were impacted: visits from Japan declined 20% between 2012 and 2015, before starting to grow again in 2016. In 2017, visits were up 2% on 2012 visit levels.
- According to the latest official data, this growth trend for visits from Japan to the UK continued in the first nine months of 2018 overall.
- The most popular time for the Japanese to visit the UK is July-September (33% of visits in 2017 were made then).
- Half of visits from Japan to the UK were for holidays, followed by business visits (30% in 2017). The holidaymakers stayed longer than business visitors but the latter spent more per night in the UK on average than other visitors from Japan.
- London is by far the leading destination for a trip to Britain: visitors from Japan spent over half their nights in the UK in 2015-2017 in London (52%).
- About 1-in-2 Japanese holiday visitors* are repeating a visit.

Source: International Passenger Survey (IPS) by ONS, Oxford Economics; *excluding nil-night visits, and those made by British expats, based on IPS 2015

+37% spent in the UK by Japanese visitors in 2017, compared to 2010
1.1 Key statistics: global context and 10 year trend

Global context

<table>
<thead>
<tr>
<th>Measure</th>
<th>Measure</th>
<th>Visits (000s)</th>
<th>Nights (000s)</th>
<th>Spend (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>International tourism expenditure (US$bn)</td>
<td>2017</td>
<td>18.2</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Global rank for international tourism</td>
<td>2017</td>
<td>18</td>
<td></td>
<td></td>
</tr>
<tr>
<td>expenditure</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Number of outbound overnight visits (m)</td>
<td>2017</td>
<td>22.9</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Most visited destination overall</td>
<td>USA</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Most visited destination in Europe</td>
<td>Germany</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Inbound travel to the UK overview

<table>
<thead>
<tr>
<th>Measure</th>
<th>10 year trend (07-17)</th>
<th>Visits (000s)</th>
<th>Nights (000s)</th>
<th>Spend (£m)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>-20%</td>
<td>308</td>
<td>2,691</td>
<td>226</td>
</tr>
<tr>
<td>2008</td>
<td></td>
<td>239</td>
<td>2,175</td>
<td>165</td>
</tr>
<tr>
<td>2009</td>
<td></td>
<td>235</td>
<td>2,592</td>
<td>305</td>
</tr>
<tr>
<td>2010</td>
<td></td>
<td>223</td>
<td>1,905</td>
<td>182</td>
</tr>
<tr>
<td>2011</td>
<td></td>
<td>237</td>
<td>1,949</td>
<td>191</td>
</tr>
<tr>
<td>2012</td>
<td></td>
<td>243</td>
<td>2,806</td>
<td>306</td>
</tr>
<tr>
<td>2013</td>
<td></td>
<td>225</td>
<td>2,237</td>
<td>213</td>
</tr>
<tr>
<td>2014</td>
<td></td>
<td>222</td>
<td>1,696</td>
<td>226</td>
</tr>
<tr>
<td>2015</td>
<td></td>
<td>194</td>
<td>2,060</td>
<td>214</td>
</tr>
<tr>
<td>2016</td>
<td></td>
<td>246</td>
<td>2,288</td>
<td>215</td>
</tr>
<tr>
<td>2017</td>
<td></td>
<td>247</td>
<td>1,988</td>
<td>250</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey by ONS, UNWTO, Oxford Economics
## 1.1 Key statistics – volume and value

### Inbound volume and value

<table>
<thead>
<tr>
<th>Measure</th>
<th>2017</th>
<th>Change vs. 2016</th>
<th>Rank out of UK top markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visits (000s)</td>
<td>247</td>
<td>+0.4%</td>
<td>28</td>
</tr>
<tr>
<td>Nights (000s)</td>
<td>1,988</td>
<td>-13%</td>
<td>37</td>
</tr>
<tr>
<td>Spend (£m)</td>
<td>250</td>
<td>+16%</td>
<td>28</td>
</tr>
</tbody>
</table>

### Nights per visit, spend

<table>
<thead>
<tr>
<th>Averages by journey purpose in 2017</th>
<th>Nights per visit</th>
<th>Spend per night</th>
<th>Spend per visit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>7</td>
<td>£133</td>
<td>£959</td>
</tr>
<tr>
<td>Business</td>
<td>4</td>
<td>£267</td>
<td>£1,113</td>
</tr>
<tr>
<td>Visiting Friends/Relatives*</td>
<td>13</td>
<td>£59</td>
<td>£738</td>
</tr>
<tr>
<td>All visits</td>
<td>8</td>
<td>£126</td>
<td>£1,011</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey by ONS; * low sample size
1.1 Key statistics: journey purpose

• Most visits from Japan to the UK are made for leisure: half were made for holidays and 14% to visit friends or relatives. However, business is the second-most common reason for which the Japanese visit the UK, comprising 30% of all Japanese visits in 2017.

• Japanese visitors were about half as likely to be visiting friends and relatives in the UK than the all-market average in 2017. Other visits were made for study (3%), or miscellaneous purposes (3%).

• 49% of staying holiday visits made by Japanese residents to the UK (excl. UK nationals) are made by repeat visitors, below the all-market average (63%).

• In 2017 holiday visits were the only type of visits from Japan to the UK that increased compared to 2016.

• Altogether, there were over twice as many leisure visits than business visits from Japan to the UK: 158,000 visits for holiday and VFR, compared to 74,000 business visits.

• However, Japanese business visitors spent twice as much as the Japanese holidaymakers per night in the UK in 2017 (£267 vs £133 respectively).

• In 2017, holidaymakers from Japan spent more nights in the UK on average per visit than business visitors from Japan for the first time in the last five years.

Source: International Passenger Survey by ONS; repeat / first time visitors question asked in 2015
1.1 Key statistics: seasonality

Seasonality 2017

- The most popular time for Japanese visitors to come the UK is in the summer months: in 2017, a third of visits from Japan to the UK were made between July and September, slightly above the global average.
- The winter and autumn months are also quite popular with 28% of visits made between January and March, and 23% in October-December 2017.
- April-June is the least popular for a visit from Japan to the UK: 16% of visits in 2017, compared to 28% across all markets.

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

Accommodation stayed in, 2015-2017
(nights, %share)

- Hotel/guest house: 39%
- Free guest with relatives or friends: 8%
- Hostel/university/school: 7%
- Paying guest family or friends house: 6%
- Other: 11%
- Bed & Breakfast: 5%
- Rented house/flat: 3%
- Own home: 1%
- Camping/caravan: 0.1%
- Holiday village/Centre: 0.1%

Duration of stay trend
(visits 000s, 3-year rolling average)

- 1-3 nights: 89
- 4-7 nights: 72
- 8-14 nights: 41
- 15+ nights: 25

Source: International Passenger Survey by ONS

- Most Japanese visitors stay in the UK for a week or less, with slightly more visits lasting 4-7 nights than short stays of 1-3 nights. Proportions of those types of stays versus longer ones have remained fairly similar, but stays of 8 to 14 nights have picked up in the last few years.
- On average in 2015-2017, Japanese visitors spent about 2-in-5 nights in the UK at hotels or guest houses, with more than 1-in-4 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 (11% and 7% respectively).
1.1 Key statistics: repeat visits and package tours

Proportion of overnight holiday visitors to the UK that have visited the UK before*

<table>
<thead>
<tr>
<th>Country</th>
<th>Repeat Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hong Kong</td>
<td>52%</td>
</tr>
<tr>
<td>China</td>
<td>30%</td>
</tr>
<tr>
<td>South Korea</td>
<td>21%</td>
</tr>
<tr>
<td>Japan</td>
<td>49%</td>
</tr>
<tr>
<td>All markets</td>
<td>63%</td>
</tr>
</tbody>
</table>

Proportion of visits that are bought as part of a package or all-inclusive tour** (2015-2017)

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Japan</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Holiday</td>
<td>10%</td>
<td>14%</td>
</tr>
<tr>
<td>VFR</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>Study</td>
<td>10%</td>
<td>12%</td>
</tr>
<tr>
<td>Misc.</td>
<td>13%</td>
<td>7%</td>
</tr>
<tr>
<td>All journey</td>
<td>6%</td>
<td>6%</td>
</tr>
</tbody>
</table>

- Only 49% 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 between 2015 and 2017.

Source: International Passenger Survey by ONS. *2015, excluding British nationals; **See definition of a package visit in appendix, sample size for 2015-2017 data for ‘Study’ visits is quite low (34 and 39 respondents respectively)
1.2 Getting around Britain: regional spread

Annual visits to the UK (2015-2017 average)

<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>2,112</td>
<td>229</td>
<td>226</td>
</tr>
<tr>
<td>Scotland (SC)</td>
<td>89</td>
<td>16</td>
<td>9</td>
</tr>
<tr>
<td>Wales (WA)</td>
<td>25</td>
<td>4</td>
<td>1</td>
</tr>
<tr>
<td>Northern Ireland (NI)</td>
<td>5</td>
<td>1</td>
<td>&lt;1</td>
</tr>
<tr>
<td>London (LDN)</td>
<td>1,088</td>
<td>169</td>
<td>151</td>
</tr>
<tr>
<td>North East (NE)</td>
<td>24</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>North West (NW)</td>
<td>159</td>
<td>12</td>
<td>15</td>
</tr>
<tr>
<td>Yorkshire (YO)</td>
<td>35</td>
<td>5</td>
<td>1</td>
</tr>
<tr>
<td>West Midlands (WM)</td>
<td>74</td>
<td>7</td>
<td>5</td>
</tr>
<tr>
<td>East Midlands (EM)</td>
<td>52</td>
<td>6</td>
<td>3</td>
</tr>
<tr>
<td>East of England (EoE)</td>
<td>92</td>
<td>9</td>
<td>7</td>
</tr>
<tr>
<td>South West (SW)</td>
<td>138</td>
<td>15</td>
<td>10</td>
</tr>
<tr>
<td>South East (SE)</td>
<td>324</td>
<td>25</td>
<td>22</td>
</tr>
<tr>
<td>Nil nights (Nil)</td>
<td>N/A</td>
<td>2</td>
<td>&lt;1</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey by ONS. Visits data for nations and regions includes overnight stays, not day trips.
1.2 Getting around Britain: regional spread and top towns and cities


<table>
<thead>
<tr>
<th>Town</th>
<th>Average yearly overnight visits (000s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>London</td>
<td>164</td>
</tr>
<tr>
<td>Edinburgh*</td>
<td>10</td>
</tr>
<tr>
<td>Manchester*</td>
<td>8</td>
</tr>
<tr>
<td>Oxford*</td>
<td>8</td>
</tr>
</tbody>
</table>

- London is the leading destination for a trip to Britain by far. 52% of the nights spent in the UK by visitors from Japan were in London, compared to 40% of all inbound visitors' nights in 2015-2017.
- A similar proportion of the nights spent in the UK by Japanese visitors was spent in the rest of England, 43% on average in 2015-2017. Japanese visitors were 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 (2015-2017)

Source: International Passenger Survey by ONS, *based on low sample size, consider with caution (fewer than 100 respondents)
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: 10%
  - All markets: 13%
- VFR: Went to countryside or villages
  - Japan: 22%
  - All markets: 17%
- Business: Went to the coast or beaches
  - Japan: 0%
  - All markets: 2%
- Business: Went to countryside or villages
  - Japan: 4%
  - 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: 4%
  - All markets: 10%
- All journey purposes: Went to countryside or villages
  - Japan: 11%
  - All markets: 13%

Source: International Passenger Survey by ONS 2016, note: VFR for Japan are based on a low sample size (61 respondents)
1.2 Getting around Britain: use of internal modes of transport

Propensity to use internal modes of transport

- **Ferry/boat**: 1% (Japan), 2% (All markets)
- **Car/vehicle you/group brought to the UK**: 1% (Japan), 15% (All markets)
- **Hired self-drive car/vehicle**: 6% (Japan), 8% (All markets)
- **Private coach/minibus (for group only)**: 6% (Japan), 4% (All markets)
- **Public bus/coach (outside town/city)**: 9% (Japan), 8% (All markets)
- **Taxi**: 67% (Japan), 53% (All markets)
- **Train (outside town/city)**: 26% (Japan), 28% (All markets)
- **Bus, Tube, Tram or Metro Train (within town/city)**: 67% (Japan), 53% (All markets)
- **Domestic flight**: 3% (Japan), 2% (All markets)

Source: International Passenger Survey by ONS, 2013
1.2 Getting around Britain: purchase of transport

Transport services purchased before or during trip (%)

- Visitors from Japan are more likely than the all-market average visitors to use transport within a city or a town. They are more likely to use public transport than taxis.
- They are also less likely to use the train to travel around Britain than other visitors; however, they are more likely to hop on a domestic flight, a public/bus coach (outside a city/town), or a private coach or minibus (as part of a group).
- Usually a small share of Japanese visitors would hire a car or take a flight within the UK to go around. If so they tend to prefer booking those transport elements before they travel.
- However, they would be more likely to purchase all other types of transport directly during their trip, except for train travel, which they would be as likely to book before or during their trip.

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

Visitor characteristics

• More visits from Japan to the UK were made by men than women (57% vs 42% respectively in 2017).
• However, looking at holiday visits only, more women visited the UK from Japan than men in 2015-2017 (54% vs 46% respectively).
• About 50% of Japanese visitors in 2017 were between 25 and 44 years old. Over the last 15 years, the number of Japanese visitors over 45 years old has increased noticeably.
• This is in line with the rapidly ageing Japanese population: about 28% of the Japanese population were 65 years old or older as estimated in 2018, with an additional 12% aged 55-64 years old.
• Despite growing in volume, few Japanese aged 65+ visit Britain.

Source: International Passenger Survey by ONS, CIA World Factbook, CAA 2016
### 1.3 Visitor demographics: gender and age groups

#### Gender ratio of visits (2017)

<table>
<thead>
<tr>
<th></th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Japan</td>
<td>57%</td>
<td>42%</td>
</tr>
<tr>
<td>All markets</td>
<td>54%</td>
<td>45%</td>
</tr>
</tbody>
</table>

#### Gender ratio of visits from Japan by journey purpose* (2015-2017)

<table>
<thead>
<tr>
<th>Journey Purpose</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Misc.</td>
<td>76%</td>
<td>24%</td>
</tr>
<tr>
<td>Study</td>
<td>32%</td>
<td>68%</td>
</tr>
<tr>
<td>VFR</td>
<td>50%</td>
<td>50%</td>
</tr>
<tr>
<td>Holiday</td>
<td>46%</td>
<td>54%</td>
</tr>
<tr>
<td>Business</td>
<td>86%</td>
<td>14%</td>
</tr>
</tbody>
</table>

#### Age group trend (visits in 000s)

<table>
<thead>
<tr>
<th>Year</th>
<th>0-15</th>
<th>16-24</th>
<th>25-34</th>
<th>35-44</th>
<th>45-54</th>
<th>55-64</th>
<th>65+</th>
<th>Not Known</th>
</tr>
</thead>
<tbody>
<tr>
<td>2017</td>
<td>2</td>
<td>28</td>
<td>61</td>
<td>61</td>
<td>57</td>
<td>21</td>
<td>16</td>
<td>0</td>
</tr>
<tr>
<td>2016</td>
<td>4</td>
<td>27</td>
<td>51</td>
<td>74</td>
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<tr>
<td>2015</td>
<td>6</td>
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<td>56</td>
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<td>50</td>
<td>50</td>
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<td>13</td>
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<td>2012</td>
<td>8</td>
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<tr>
<td>2011</td>
<td>7</td>
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<td>66</td>
<td>44</td>
<td>18</td>
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<td>2010</td>
<td>2</td>
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<td>51</td>
<td>41</td>
<td>26</td>
<td>7</td>
<td>1</td>
</tr>
<tr>
<td>2009</td>
<td>2</td>
<td>32</td>
<td>63</td>
<td>63</td>
<td>47</td>
<td>21</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>6</td>
<td>27</td>
<td>67</td>
<td>57</td>
<td>52</td>
<td>25</td>
<td>4</td>
<td></td>
</tr>
<tr>
<td>2007</td>
<td>13</td>
<td>55</td>
<td>79</td>
<td>77</td>
<td>52</td>
<td>27</td>
<td>6</td>
<td></td>
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<tr>
<td>2006</td>
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<td>102</td>
<td>76</td>
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<td>2005</td>
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<td>89</td>
<td>73</td>
<td>62</td>
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<td>7</td>
<td></td>
</tr>
<tr>
<td>2004</td>
<td>15</td>
<td>58</td>
<td>90</td>
<td>84</td>
<td>66</td>
<td>27</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>2003</td>
<td>8</td>
<td>56</td>
<td>95</td>
<td>75</td>
<td>46</td>
<td>24</td>
<td>10</td>
<td></td>
</tr>
</tbody>
</table>

*Source: International Passenger Survey by ONS; * Low sample size for Study visits (sample = 29), please consider this data with caution.
1.3 Visitor demographics: origin

Visits to the UK

- Most visits from Japan to the UK are made by visitors from the central part of Japan.
- More than 1-in-2 visits from Japan to the UK originate from Kanto, which includes the Greater Tokyo area, followed by those from Kinki (16%), and Chubu (14%).
- A third of the Japanese population actually lives in or around Tokyo, on the Kanto central plain. 94% of the population lives in urban areas, with the regions of high density being along the coasts.

Visits in 000s | % share of visits (2007)

<table>
<thead>
<tr>
<th>Region</th>
<th>Visits (000s)</th>
<th>% Share</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kanto (incl. Tokai and Shinetsu)</td>
<td>114</td>
<td>56%</td>
</tr>
<tr>
<td>Chubu (incl. Hokuriku)</td>
<td>28</td>
<td>14%</td>
</tr>
<tr>
<td>Kinki</td>
<td>33</td>
<td>16%</td>
</tr>
<tr>
<td>Chugoku</td>
<td>7</td>
<td>3%</td>
</tr>
<tr>
<td>Kyushu (incl. Okinawa)</td>
<td>10</td>
<td>5%</td>
</tr>
<tr>
<td>Hokkaido</td>
<td>2</td>
<td>1%</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey by ONS (2007 data; will be updated with 2018 data), CIA World Factbook
1.4 Britain and competitors

Market size, share and growth potential

- Britain was the 5th most visited destination in Europe by Japanese travellers for overnight trips in 2017, behind Germany, France, Spain and Italy.
- The Japanese outbound market has been struggling in recent years, although a more positive trend has been observed since 2016. Japanese outbound visits are forecast to continue increasing in the coming years: forecasts suggest outbound visits will reach over 30 million in 2025, up 33% on 2017.
- While visits to the UK are also expected to grow, forecasts show that they would grow at a slower rate than the overall outbound visits from Japan between 2017 and 2025 (+11%).
- Britain has maintained its market share in the ten years to 2017, while the US, Spain and Italy gained some among our selected competitor destination set.
- Looking forward, the UK’s market share is forecast to decline very slightly; meanwhile, the US is forecast to lose share with France, Germany, and Australia gaining.

Source: Oxford Economics
1.4 Britain and competitors

Britain’s market share of Japanese outbound visits among competitor set

<table>
<thead>
<tr>
<th>Country</th>
<th>2017</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>United States</td>
<td>56%</td>
<td>52%</td>
</tr>
<tr>
<td>Germany</td>
<td>9%</td>
<td>10%</td>
</tr>
<tr>
<td>France</td>
<td>7%</td>
<td>10%</td>
</tr>
<tr>
<td>Spain</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>Australia</td>
<td>7%</td>
<td>8%</td>
</tr>
<tr>
<td>Italy</td>
<td>6%</td>
<td>5%</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>4%</td>
<td>4%</td>
</tr>
<tr>
<td>Switzerland</td>
<td>4%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Historic and potential overnight visits to Britain (000s)

Source: Oxford Economics, based on overnight visit
Chapter 2: Experiences and perceptions
2.1 Inbound activities

- For Japanese visitors, dining in restaurants is the most popular activity when they visit the UK, followed by going shopping, and visiting museums and art galleries. Sightseeing famous monuments/buildings and visiting castles or historic houses also often feature in Japanese visits to the UK.
- 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 to Britain.

---

<table>
<thead>
<tr>
<th>Top 10 activities for Japanese visitors during their visit to the UK</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Dining in restaurants</td>
</tr>
<tr>
<td>2. Going shopping</td>
</tr>
<tr>
<td>3. Visiting museums or art galleries</td>
</tr>
<tr>
<td>4. Sightseeing famous monuments/buildings</td>
</tr>
<tr>
<td>5. Visiting castles or historic houses</td>
</tr>
<tr>
<td>6. Going to the pub</td>
</tr>
<tr>
<td>7. Visiting parks or gardens</td>
</tr>
<tr>
<td>8. Socialising with locals</td>
</tr>
<tr>
<td>9. Visiting religious buildings</td>
</tr>
<tr>
<td>10. Walking in the countryside</td>
</tr>
</tbody>
</table>

For more information on activities, please consult: [https://www.visitbritain.org/activities-undertaken-britain](https://www.visitbritain.org/activities-undertaken-britain)
2.1 Inbound activities

Propensity to visit museums and art galleries or go on a guided tour

- Holiday: went on a guided tour (Japan: 28%, All markets: 29%)
- Holiday: visited museums and art galleries (Japan: 49%, All markets: 48%)
- All journey purposes: went on a guided tour (Japan: 16%, All markets: 15%)
- All journey purposes: visited museums and art galleries (Japan: 38%, All markets: 28%)

Propensity to visit built heritage sites

- Holiday: visited religious buildings (Japan: 34%, All markets: 35%)
- Holiday: visited castles/historic houses (Japan: 42%, All markets: 48%)
- All journey purposes: visited religious buildings (Japan: 20%, All markets: 20%)
- All journey purposes: visited castles/historic houses (Japan: 30%, All markets: 28%)

Source: International Passenger Survey by ONS, 2017 (‘went on a guided tour’), and 2016 (other activities)
2.1 Inbound activities

Propensity to attend the performing arts

- Holiday: went to the theatre/musical/opera/ballet
  - Japan: 11%
  - All markets: 14%
- Holiday: attended a festival
  - Japan: 1%
  - All markets: 4%
- Holiday: attended a live music event
  - Japan: 7%
  - All markets: 10%
- All journey purposes: went to the theatre/musical/opera/ballet
  - Japan: 11%
  - All markets: 9%
- All journey purposes: attended a festival
  - Japan: 1%
  - All markets: 3%
- All journey purposes: attended a live music event
  - Japan: 5%
  - All markets: 7%

Propensity to visit literary, music, TV or film locations

- Holiday: visited literary, music, TV, or film locations
  - Japan: 5%
  - All markets: 9%
- All journey purposes: visited literary, music, TV, or film locations
  - Japan: 4%
  - All markets: 5%

Source: International Passenger Survey by ONS, 2017 (live music, visiting literary, music, TV or film locations), 2016 (other performing arts)
2.1 Inbound activities

Propensity to take part in sports activities

- Holiday: took part in sports activities
  - Japan: 1.3%
  - All markets: 3%

- All journey purposes: took part in sports activities
  - Japan: 1%
  - All markets: 2%

Propensity to visit a park/garden or a national park

- Holiday: visited a National Park
  - Japan: 8%
  - All markets: 11%

- Holiday: visited parks or gardens
  - Japan: 4%
  - All markets: 7%

Propensity to walk in the countryside

- All journey purposes: Walking in the countryside
  - Japan: 18%
  - All markets: 20%

- Holiday: Walking in the countryside
  - Japan: 19%
  - All markets: 26%

Source: International Passenger Survey by ONS, 2016
2.1 Inbound activities

Propensity to go to a pub, and socialise with the locals

- Holiday: socialising with the locals
  - Japan: 19%
  - All markets: 32%
- Holiday: went to pub
  - Japan: 32%
  - All markets: 48%
- All journey purposes: socialising with the locals
  - Japan: 20%
  - All markets: 32%
- All journey purposes: went to pub
  - Japan: 30%
  - All markets: 42%

Propensity to go dining in restaurants, or to go to bars or night clubs

- Holiday: went to bars or night clubs
  - Japan: 5%
  - All markets: 15%
- Holiday: dining in restaurants
  - Japan: 60%
  - All markets: 70%
- All journey purposes: went to bars or night clubs
  - Japan: 4%
  - All markets: 12%
- All journey purposes: dining in restaurants
  - Japan: 59%
  - All markets: 61%

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

Propensity to go shopping

- Holiday: went shopping
  - Japan: 74%
  - All markets: 69%
- All journey purposes: went shopping
  - Japan: 55%
  - All markets: 54%

Propensity to go to a spa or beauty centre

- Holiday: went to a spa or beauty centre
  - Japan: 1%
  - All markets: 3%
- All journey purposes: went to a spa or beauty centre
  - Japan: 2%
  - All markets: 2%

Propensity to purchase selected items

- None of these
  - Japan: 34%
  - All markets: 38%
- Other holiday souvenir (not mentioned above)
  - Japan: 23%
  - All markets: 16%
- Items for your home e.g. furnishing
  - Japan: 6%
  - All markets: 5%
- Electrical or electronic items e.g. camera
  - Japan: 6%
  - All markets: 3%
- CDs, DVDs, computer games etc
  - Japan: 5%
  - All markets: 2%
- Food or drink
  - Japan: 6%
  - All markets: 2%
- Games, toys or gifts for children
  - Japan: 9%
  - All markets: 7%
- Books or stationery
  - Japan: 13%
  - All markets: 18%
- Cosmetics or toiletries e.g. perfume
  - Japan: 13%
  - All markets: 11%
- Bags, purses etc
  - Japan: 14%
  - All markets: 9%
- Personal accessories e.g. jewellery
  - Japan: 8%
  - All markets: 9%
- Clothes or shoes
  - Japan: 36%
  - All markets: 41%

Source: International Passenger Survey by ONS, 2013
2.2 Welcome and recommending Britain

Feeling of ‘welcome’ in Britain

- **Japan**
  - Extremely welcome: 25%
  - Very welcome: 39%
  - Quite welcome: 9%
  - Not very welcome: 12%
  - Not at all welcome: 0%

- **All markets**
  - Extremely welcome: 65%
  - Very welcome: 49%
  - Quite welcome: 9%
  - Not very welcome: 0%
  - Not at all welcome: 0%

Likelihood to recommend Britain

- **Japan**
  - Extremely likely: 47%
  - Very likely: 45%
  - Quite likely: 9%
  - Not very likely: 0%
  - Not at all likely: 0%

- **All markets**
  - Extremely likely: 40%
  - Very likely: 45%
  - Quite likely: 13%
  - Not very likely: 0%
  - Not at all likely: 0%

- Overall, leisure visitors from Japan are more likely to feel ‘extremely’ or ‘very’ welcome than the all-market average.
- 47% of Japanese visitors were ‘extremely’ likely to recommend Britain for a short trip or a holiday, similar to the average.

Source: CAA 2016, base for Japan = 66 respondents
2.3 Perceptions of Britain

• 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.
• The Japanese rank the UK 4th overall out of 50 nations for its ‘country brand’, and for tourism and for people, as well as 5th for its culture, just behind the global average for the UK (4th).

Source: VisitBritain/IPSOS 2016, Anholt Nation Brands Index 2018 powered by Ipsos, Arkenford 2013
2.3 Perceptions of Britain

Britain’s ranking (out of 50 nations)

<table>
<thead>
<tr>
<th>Measure</th>
<th>Japanese respondents</th>
<th>All respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overall Nation Brand</strong></td>
<td>4</td>
<td>3</td>
</tr>
<tr>
<td><strong>Culture (overall)</strong></td>
<td>5</td>
<td>4</td>
</tr>
<tr>
<td>The country has a rich cultural heritage</td>
<td>5</td>
<td>7</td>
</tr>
<tr>
<td>The country is an interesting and exciting place for contemporary culture such as music, films, art and literature</td>
<td>5</td>
<td>4</td>
</tr>
<tr>
<td>The country excels at sports</td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td><strong>People (overall)</strong></td>
<td>4</td>
<td>6</td>
</tr>
<tr>
<td>If I visited the country, the people would make me feel welcome</td>
<td>15</td>
<td>15</td>
</tr>
<tr>
<td><strong>Tourism (overall)</strong></td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Would like to visit the country if money was no object</td>
<td>5</td>
<td>5</td>
</tr>
<tr>
<td>The country is rich in natural beauty</td>
<td>21</td>
<td>24</td>
</tr>
<tr>
<td>The country is rich in historic buildings and monuments</td>
<td>6</td>
<td>5</td>
</tr>
<tr>
<td>The country has a vibrant city life and urban attractions</td>
<td>4</td>
<td>4</td>
</tr>
</tbody>
</table>

Source: Anholt Nation Brands Index, powered by Ipsos, 2018
2.3 Perceptions of Britain

Cultural associations

<table>
<thead>
<tr>
<th>Cultural Product</th>
<th>Japan</th>
<th>All Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Museums</td>
<td>49%</td>
<td>47%</td>
</tr>
<tr>
<td>Music</td>
<td>33%</td>
<td>39%</td>
</tr>
<tr>
<td>Films</td>
<td>25%</td>
<td>39%</td>
</tr>
<tr>
<td>Sports</td>
<td>23%</td>
<td>37%</td>
</tr>
<tr>
<td>Modern Design</td>
<td>21%</td>
<td>30%</td>
</tr>
<tr>
<td>Pop videos</td>
<td>12%</td>
<td>29%</td>
</tr>
<tr>
<td>Opera</td>
<td>15%</td>
<td>25%</td>
</tr>
<tr>
<td>Sculpture</td>
<td>11%</td>
<td>25%</td>
</tr>
<tr>
<td>Street Carnival</td>
<td>7%</td>
<td>15%</td>
</tr>
<tr>
<td>Circus</td>
<td>6%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Adjectives describing a potential trip to Britain

<table>
<thead>
<tr>
<th>Adjective</th>
<th>Japan</th>
<th>All Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Educational</td>
<td>18%</td>
<td>35%</td>
</tr>
<tr>
<td>Fascinating</td>
<td>10%</td>
<td>32%</td>
</tr>
<tr>
<td>Exciting</td>
<td>17%</td>
<td>31%</td>
</tr>
<tr>
<td>Romantic</td>
<td>10%</td>
<td>21%</td>
</tr>
<tr>
<td>Relaxing</td>
<td>10%</td>
<td>17%</td>
</tr>
<tr>
<td>Spiritual</td>
<td>5%</td>
<td>8%</td>
</tr>
<tr>
<td>Boring</td>
<td>4%</td>
<td>7%</td>
</tr>
<tr>
<td>Stressful</td>
<td>3%</td>
<td>7%</td>
</tr>
<tr>
<td>Risky</td>
<td>4%</td>
<td>6%</td>
</tr>
<tr>
<td>Depressing</td>
<td>4%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Source: Anholt Nation Brands Index, powered by Ipsos, 2018; 19% of Japanese respondents did not associate the UK with any of the cultural products or services above, and 26% of the Japanese respondents did not pick any of the adjectives above to describe a potential trip to Britain.
### 2.3 Perceptions of Britain

#### Holiday wants and % saying destination is best place for...  

<table>
<thead>
<tr>
<th>Importance</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 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 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 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 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 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 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 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 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 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 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 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 Explore the place</td>
<td>30%</td>
<td>31%</td>
<td>22%</td>
<td>27%</td>
<td>26%</td>
<td>22%</td>
</tr>
<tr>
<td>5.27 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 Feel special or spoil</td>
<td>35%</td>
<td>43%</td>
<td>24%</td>
<td>24%</td>
<td>23%</td>
<td>24%</td>
</tr>
<tr>
<td>5.25 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 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 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 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 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 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>
<tr>
<td>4.98 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 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 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 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 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 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 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 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 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 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 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 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 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 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 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 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 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 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 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 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 Britain

Motivations for choosing Britain as a holiday destination

Source: VisitBritain/IPSOS 2016, base: visitors (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)
2.3 Perceptions of Britain

Sought-after Britain activities

- Visit Buckingham Palace: 38%
- Enjoy traditional afternoon tea & cakes: 24%
- Take a leisurely steam cruise in the Lake District: 20%
- Visit Edinburgh castle: 18%
- View London from Shard tower / London Eye: 16%
- Take the mountain train up Snowdon: 16%
- Visit 16th c. historic Chatsworth House & gardens: 15%
- Go to a Premier League football match: 14%
- Have fish & chips at the seaside: 14%
- Shop on London's Oxford Street: 13%
- Dine by the fire in a cosy Welsh pub: 13%
- Spot wildlife in Scottish Highlands: 13%
- Go walking in Yorkshire's moors & hills: 12%
- Tour around quaint Cotswold villages: 12%
- Watch a musical in London's West End: 11%
- Relax in Bath rooftop spa overlooking Roman baths: 10%
- Go on the Harry Potter studio tour: 10%
- Visit Chatsworth House & gardens: 10%
- Go walking in Yorkshire's moors & hills: 9%
- Go to a Premier League football match: 6%
- Visit premium Chatsworth House & gardens: 4%
- Visit 16th c. historic Chatsworth House & gardens: 4%
- Go walking in Yorkshire's moors & hills: 4%
- None of these: 27%

Source: Anholt-GfK Nation Brands Index 2013; If you went on a holiday/vacation to Britain which of the following activities would you most like to do? Please choose a first, second and third choice.
Chapter 3:
Understanding the market
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 (37.5m), Osaka (19.3m), Nagoya (9.5m), Kitakyushu-Fukuoka (5.6m), 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 over 85 years old) and one of the lowest birth and fertility rates in world (respectively 7.5 births for 1,000 population, ranking 223rd globally, and 1.42 children born per woman, ranking 209th globally, according to 2018 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.

3.1 Structural drivers: general market overview

General market conditions

• The Japanese population is ageing and is expected to fall by 1% between 2018 and 2022. The Japanese median age was 33 in 1980, and is expected to be 52 by 2030. Japan is the second oldest country when ranking the world’s nations by median age.
• Japanese workers get between 10 and 20 days of annual leave depending on seniority.

Key demographic and economic data

<table>
<thead>
<tr>
<th>Measure (2018 data)</th>
<th>Japan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population (m)</td>
<td>127.1</td>
</tr>
<tr>
<td>GDP per capita PPP (US$)</td>
<td>38,300</td>
</tr>
<tr>
<td>Annual average GDP growth over past decade (%)</td>
<td>0.7</td>
</tr>
<tr>
<td>Annual average GDP growth in 2017 (%)</td>
<td>0.8</td>
</tr>
</tbody>
</table>

• Despite weak growth since the early 1990s, Japan was the world’s 4th largest economy by GDP in PPP terms* in 2017, after China, the USA, and India.
• Since 2012, its economy has been recovering, albeit inconsistently. 2018 and 2019 have been hindered by some difficulties in financial markets. GDP growth year-on-year should remain positive for 2018 and 2019, although somewhat sluggish.
• Some risks still exist in the Japanese economy, including a new increase in consumption tax scheduled for the last quarter of 2019.
• However, the labour market is quite robust with very low unemployment which should help maintain consumption and domestic demand. Businesses investment in research and development and capacity expansion are also strong.


*Purchasing Power Parity, adjusts the GDP value for price differences
3.1 Structural drivers: demographic and social indicators

Population dynamics

<table>
<thead>
<tr>
<th>Measure</th>
<th>2018 estimate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total population (m)</td>
<td>127.1</td>
</tr>
<tr>
<td>Median age</td>
<td>48 years old</td>
</tr>
<tr>
<td>Population growth rate (2018-2022)</td>
<td>-1%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Indicator</th>
<th>1980</th>
<th>2015</th>
<th>2030</th>
<th>2050</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fertility rate (live births per woman, over 5 years ending in year shown)</td>
<td>1.83</td>
<td>1.41</td>
<td>1.58</td>
<td>1.70</td>
</tr>
<tr>
<td>Median age (in years)</td>
<td>32.6</td>
<td>46.5</td>
<td>51.5</td>
<td>53.3</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 1% between 2018 and 2022.
- However, by 2030, total fertility should slightly go up again. Meanwhile, 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.
- In 2017, Japan returned as a growth engine for high net wealth in its region, and its HNWI* population increased 9% on 2016. Japan ranks as the 2nd largest source market of HNWIs in 2017, with over 3.2 million HNWIs.


* HNWI stands for High Net Worth Individual, definition in appendix.
3.1 Structural drivers: economic indicators

Economic indicators
(% growth unless stated)

<table>
<thead>
<tr>
<th>Indicator</th>
<th>2017</th>
<th>2018</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Real GDP</td>
<td>1.9%</td>
<td>0.8%</td>
<td>1.0%</td>
<td>0.3%</td>
</tr>
<tr>
<td>Real consumer spending</td>
<td>1.1%</td>
<td>0.5%</td>
<td>1.2%</td>
<td>-0.2%</td>
</tr>
<tr>
<td>Unemployment rate</td>
<td>2.8%</td>
<td>2.4%</td>
<td>2.3%</td>
<td>2.4%</td>
</tr>
</tbody>
</table>

- Despite good business sentiment, the Japanese economy still faces some uncertainties. But good employment figures should support consumer spending in 2019.
- 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.
- The Japanese economy remains the 4th largest economy in the world though. In 2017, Japan was a driving force behind rising HNWI numbers and wealth in Asia Pacific, along with China.
- Tokyo is the largest city in the world. Along with Osaka and Nagoya, those three should remain in the top 20 cities in the world by consumption value by 2030, according to McKinsey.

3.1 Structural drivers: exchange rate trends

Exchange rate trends (cost of GBP in JPY)

Please find the most up-to-date exchange rate trend based on monthly averages at visitbritain.org/visitor-economy-facts.

Source: Bank of England
3.2 Consumer trends

• In 2017, there were 17.9 million departures made by Japanese residents overseas. This is up for the second year in a row (+4.5% over 2016), but still behind the 2012 record of 18.5 million outbound departures. Latest figures for January-April 2018 confirm this recovery trend.
• The Henley Passport Index ranked the Japanese passport the most powerful in the world in 2018. In 2016, over 30 million Japanese passports were in circulation which equals about one quarter of the Japanese population. The ratio of passports that were issued in 2016 was relatively high among Japanese aged 30 years or younger.
• FIT (free independent travels) outnumbered package tours and group travel for the purpose of tourism in 2017, accounting for 59% of Japanese overseas trips.
• Security and safety plays an important role in the decision of a holiday destination for Japanese travellers.
• Japanese consider Hawaii as their most desirable destination. Europe gained some interest in 2017; France, Italy and also Scandinavia tend to top the list of preferred European destinations.


30% of Japanese will be aged 65 years or over in 2030
3.2 Consumer trends: overall trends

Wellbeing and health
- There is a boom in people pursuing healthy and happy lifestyles not only physically but also mentally. Consumption of organic foods and an emphasis on fitness through activities such as yoga demonstrate this.
- Wellbeing is recognised as an important part of longevity and consumers realise that their long work hours impact on health. Health products and supplements are some of the most heavily advertised products in Japan. Beauty centres, spa and travelling for spa treatments feature prominently in Japan.

Ageing population
- With one of the lowest fertility rates in the world and highest longevity, Japan society is ageing, making the older segments especially important; however, at present these only account for a small proportion of visitors to the UK.
- The Japanese retirees constitute a key target segment for entertainment and travel industries as they have both money and time, making them a target for the travel trade too. Lately though solutions like virtual reality has allowed them to see the world’s wonders without travelling.

Security and safety concerns
- The March 2011 earthquake and tsunami caused crucial damage and impact on overseas travel just after the disaster. During this period, outbound travel slowed down. However, the initial impact was still less than previous crises such as September 11, SARS, and Swine Flu.
- Even recently, security remains a big concern: the attacks in Europe have certainly not played in favour of outbound travel to this continent. France lost its title of most visited European destination from Japan in 2016 (but it has been gaining back market share in the following years). The trade also reported some slowdown in demand for the UK in the summer of 2017, although there were few cancellations. In 2018 still, half of those reluctant to travel picked ‘security concerns’ as a factor hindering overseas travel in general (60% in 2017 though), the most quoted factor why Japanese people did not travel last year.

3.2 Consumer trends: travel trends

Rise of the FIT segment and change in travel trends

- With just over half of overseas tourism trips taken independently (59% in 2017), the ‘Free and Independent Travel’ segment, or FIT, is changing the overseas travel landscape in Japan. More flexibility on travel itinerary, smaller travel groups and other travel-related offers are now required by many in the market.

- The importance of social media and, as a consequence, of the image overseas travellers are presenting of themselves on the likes of Instagram accounts for some of the changes. Inspiration for a trip is increasingly taken from blogs and other social media influencers. Images and experiences that can be shared on Instagram can also influence the way an itinerary is built by the Japanese independent travellers.

- They will still want safety guarantees; and historic sites, cultural attractions and food will still be important parts of their trip. But many also increasingly prefer to eat where locals eat vs. restaurants that could accommodate groups or mainly cater for tourists, or to discover new destinations rather than going back to the same place.

Different travel needs for different demographic groups

- While nature and scenery are important components of a trips for all, women will also be more likely to favour relaxing activities and shopping. Women travelling alone still represent a valuable segment of the Japanese outbound market, and sometimes travel for shopping as their main purpose. 15-24 year-old women solo travellers helped international departures from Japan return to growth in the last few years, whilst fewer 55-64 year-old women travelled.

- Traditionally, graduating students used to take a “graduation trip” (or sotsugyo ryoko) between February and March and this was a highly coveted segment for the travel industry in Japan. With some young people staying at home, with no work, graduating trips are important for that age segment.

- As the Japanese population is ageing, older people’s travel needs are becoming quite important. This older group still tends to travel in full-package tours. Around 3-in-4 older men and women would prefer a full-package option to go abroad when choosing a travel package type, as it can help address language or security barriers.

Source: JTB Report 2018
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 the UK 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, JTB Tourism Research & Consulting
3.3 Booking and planning: booking channels and ticket sales

How trips to Britain were booked

<table>
<thead>
<tr>
<th></th>
<th>Japan</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel only</td>
<td></td>
<td></td>
</tr>
<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>
<tr>
<td>Accommodation only</td>
<td></td>
<td></td>
</tr>
<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>
<tr>
<td>Holiday (travel and accommodation)</td>
<td></td>
<td></td>
</tr>
<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>

- Japanese visitors are quite digital-savvy, with most of them booking transport to the UK 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 UK holidays through a travel agent, tour operator or travel comparison website.

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

**Decision lead-time for visiting Britain**

<table>
<thead>
<tr>
<th></th>
<th>Japan</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Starting to think about trip</strong></td>
<td></td>
<td></td>
</tr>
<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>
<tr>
<td><strong>Deciding on the destination</strong></td>
<td></td>
<td></td>
</tr>
<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>
<tr>
<td><strong>Looking at options/ prices</strong></td>
<td></td>
<td></td>
</tr>
<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>
<tr>
<td><strong>Booking the trip</strong></td>
<td></td>
<td></td>
</tr>
<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>

- Japanese visitors had slightly longer lead-times than the global average when preparing their visit to the UK.
- Fewer Japanese visitors would start thinking about their trip or deciding on visiting the UK 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 the UK 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 the UK 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 UK trip.
- Only slightly more Japanese visitors book their travel to the UK 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.
- A majority of internet users (69%) are active social network users with LINE having the highest number of users.
- ‘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.

Biggest influences in choosing a destination for Japanese holidaymakers:

- travel guidebooks,
- travel agent or
tour operator website

Source: ICT Research & Consulting
3.4 Reaching the consumer: broadcast media landscape

**TV**
- On average, Japanese people spent over 2 hours weekly watching TV, listening to the radio or reading newspapers and magazines in 2016.
- In terms of advertising, TV expenditure accounted for almost a third of the total ad market in 2016.
- 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.
- The proportion watching movies (other than at a movie theatre) jumped from about 40% to 52% of the Japanese population between 2011 and 2016, the highest participation rate in ‘hobbies and amusements’ in 2016. 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.

Source: BBC Japan media profile, Santander Trade Portal’s ‘Japan: Reaching the consumer’ profile, Statistics Japan on Leisure Activities and Time Use
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 afternoon 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.

Source: BBC Japan media profile, Santander Trade Portal’s ‘Japan: Reaching the consumer’ profile
3.4 Reaching the consumer: connected media landscape

**Internet**
- According to InternetWorldStats, Japan counted over 118.7 million internet users in 2018, about 93% of the country's population. Key reasons for using the Internet are for sending and receiving emails, consulting news and other media content; also for browsing websites and blogs, and online shopping. Japan is the world's second biggest market for spending on online advertising, with Japanese online advertising representing more than print advertising in 2016.
- Mobile technology, including wallet phones and other barcodes and quick scan apps and solutions have long been adopted by the Japanese market.

**Social Media**
- Social media are quite popular in Japan. The share of internet users who are active social network users is expected to grow to 77% by the end of 2019. The main reasons for using social network sites are to keep in contact with people or to know what friends are doing.
- Interest in regional players such as TikTok (Douyin in China) and Line Blog should remain stable in 2019. Both networks tend to appeal to a younger audience than Facebook, which is more used among the 30+ in Japan.
- After facing some privacy issues, use of the latter in Japan is expected to decrease slightly in 2019. Meanwhile, Twitter and Instagram should remain very popular this year.
- If Twitter has become the source of choice for Japanese to stay on top of the news, Instagram has become very popular for sharing photos. Instagram is largely used by the younger audience when on holidays, but women over 40 years old are the demographic group growing the fastest on this social media.

Source: BBC Japan media profile (quoting InternetWorldStats), Santander Trade Portal's 'Japan: Reaching the consumer' profile, Statistics Japan on Time Use, Macromill, ICT Research & Consulting, Netrating, JapanBuzz.info and Humblebunny.com
3.4 Reaching the consumer: social media on holiday

Use of social media on holiday

- The social media channels most used in the Japanese market are Youtube, Facebook, LINE, Twitter, Google+ and Instagram.
- 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)?
3.4 Reaching the consumer: influences

Influences on destination choice

- Talking to friends / relatives / colleagues: Japan (26%), All markets (34%)
- Information from search engines [e.g. Google]: Japan (29%), All markets (33%)
- Looking at prices of holidays/flights on price comparison websites: Japan (25%), All markets (31%)
- Websites providing traveller reviews of destinations [e.g. TripAdvisor]: Japan (13%), All markets (15%)
- Talking to friends or family in your social network [e.g. via Facebook / Twitter]: Japan (19%), All markets (22%)
- An accommodation provider/ hotel website: Japan (19%), All markets (22%)
- A travel guidebook: Japan (19%), All markets (22%)
- Travel agent or tour operator website: Japan (25%), All markets (37%)
- Travel blogs / forums: Japan (13%), All markets (15%)
- Travel programme on TV: Japan (13%), All markets (15%)
- A special offer or price deal you saw advertised online: Japan (19%), All markets (22%)
- Travel agent or tour operator brochure: Japan (18%), All markets (21%)
- An official tourist organisation website or social media site for the country or destination: Japan (18%), All markets (21%)
- An official tourist brochure for the country / city / region: Japan (16%), All markets (18%)
- A travel feature / article in a magazine or newspaper: Japan (16%), All markets (18%)
- Direct advice from a travel agent/tour operator (face-to-face, over the phone): Japan (15%), All markets (18%)
- Images or videos your friends or family have posted to social media: Japan (15%), All markets (18%)
- Images / information in adverts: Japan (15%), All markets (18%)
- Images / information in online adverts: Japan (15%), All markets (18%)
- A special offer or price deal you saw advertised offline e.g. in a newspaper, magazine or on TV: Japan (15%), All markets (18%)
- Images or videos from a photo/video sharing social network site: Japan (15%), All markets (18%)
- Travel app: Japan (15%), All markets (18%)
- Articles on an online encyclopaedia e.g. Wikipedia, Wikitravel: Japan (14%), All markets (15%)
- Images / information in TV adverts: Japan (14%), All markets (15%)
- Travel blogs / forums: Japan (15%), All markets (18%)
- A special offer or price deal you saw advertised online: Japan (15%), All markets (18%)
- Travel agent or tour operator website: Japan (15%), All markets (18%)
- A travel guidebook: Japan (15%), All markets (18%)
- Travel blogs / forums: Japan (15%), All markets (18%)
- Images or videos from a photo/video sharing social network site: Japan (15%), All markets (18%)
- Travel programme on TV: Japan (15%), All markets (18%)
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- Images or videos from a photo/video sharing social network site: Japan (15%), All markets (18%)
- Travel programme on TV: Japan (15%), All markets (18%)
- Travel blogs / forums: Japan (15%), All markets (18%)

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

<table>
<thead>
<tr>
<th></th>
<th>Japan</th>
<th>All markets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Have visited, film/TV main reason</td>
<td>3%</td>
<td>6%</td>
</tr>
<tr>
<td>Have visited, film/TV some influence</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Have visited, film/TV no influence</td>
<td>7%</td>
<td>9%</td>
</tr>
<tr>
<td>Not visited, but interested. Film/TV main reason</td>
<td>25%</td>
<td>35%</td>
</tr>
<tr>
<td>Not visited but interested. Film/TV some influence</td>
<td>5%</td>
<td>6%</td>
</tr>
<tr>
<td>Not visited but interested. Film/TV no influence</td>
<td>2%</td>
<td>16%</td>
</tr>
<tr>
<td>Not visited and not interested</td>
<td>52%</td>
<td>22%</td>
</tr>
</tbody>
</table>

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?
Chapter 4: Access and travel trade
4.1 Access: key facts

- Most Japanese visitors come to the UK by plane. In 2017, 7% arrived through the tunnel, virtually all via Eurostar.
- The Japanese need no visa to visit Britain. Japanese visitors flying out of Britain pay a £78 Air Passenger Duty.
- Both international airports in Tokyo, Haneda and Narita, have direct, non-stopping links to London Heathrow. Those routes are served by British Airways, Japan Airlines (JAL), and ANA. An additional direct route between Japan and the UK exists, flown by Aeroflot, but it includes a stop in Russia.
- Seat capacity on direct, non-stopping flights from Japan to Britain increased again in 2018, despite a 36% decrease in the ten years from 2008.
- In the last ten years, JAL stopped its Osaka-UK route and almost halved its capacity from Narita in 2010; ANA also reduced its capacity on the Tokyo-London route in 2012, and in 2015 Virgin Atlantic stopped its Tokyo-London route.
- However, JAL’s second daily flight between Tokyo Haneda and London, since end of October 2017, will help improve capacity to Britain: JAL has doubled its monthly departures on the Tokyo-London route. British Airways will also open a direct, non-stopping flight from Osaka in March 2019.

93% of Japanese visitors travel to the UK by plane.

Access to Britain

<table>
<thead>
<tr>
<th>Measure</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Weekly aircraft departures</td>
<td>34</td>
</tr>
<tr>
<td>Weekly aircraft seat capacity</td>
<td>7,750</td>
</tr>
<tr>
<td>Airports with direct routes in Japan</td>
<td>2</td>
</tr>
<tr>
<td>Airports with direct routes in Britain</td>
<td>1</td>
</tr>
</tbody>
</table>

Source: International Passenger Survey by ONS, Apex RdC (stopping flights only)
4.1 Access: mode of transport

Visits by mode of transport

Annual share by mode (2017)

Source: International Passenger Survey by ONS
4.1 Access: capacity

Annual airline seat capacity trends on direct, stopping flights

Airline seat capacity by carrier (2018)

Origin airport annual seat capacity (2018)

Source: Apex Rdc: includes direct, stopping flights that keep the same flight code
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.
- In 2017, 38% of Japanese people visiting Europe or Russia noted that ‘reading a pamphlet’ about the destination made them decide on it, the most common trigger for trips to Europe/Russia, and the second most popular across all destinations.
- It is structured into 3 main levels of travel companies, most of them having join 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

Major operators

- We have seen that Japanese travellers are more likely than the average visitor to book a package holiday to Britain, and to book face to face. 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 (51% of overseas tourism trips were arranged independently in 2016).

- Travel distribution is highly regulated in Japan, with actors being grouped in three different categories of travel operators and the travel agencies, depending on their values. Some stringent and complex licensing laws ensure high levels of consumer protection. 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: a UNWTO affiliate member, 700 members. It promotes domestic tourism as well as maintaining good relations with neighbouring countries.
  - JATA, Japan Association of Travel Agents: 1,187 active members as of May 2018 across all three travel company categories, as well as associate members, and allied members in Japan and abroad. It 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: travel 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 18:00.
- **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). The last edition welcomed about 200,000 visitors. It usually takes place in September, but will happen between 24th and 27th October in 2019, in Osaka.

Source: japan-guide.com, numero.com, t-expo.jp
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 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 in 2019

<table>
<thead>
<tr>
<th>Date in 2019</th>
<th>National Holiday</th>
</tr>
</thead>
<tbody>
<tr>
<td>1st January</td>
<td>New Year’s Day, Gantan</td>
</tr>
<tr>
<td>14th 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>21st March</td>
<td>Vernal/Spring Equinox Day, Shunbun no Hi</td>
</tr>
<tr>
<td>29th April</td>
<td>Showa Day, Showa no Hi (Golden Week)</td>
</tr>
<tr>
<td>1st May</td>
<td>Accession of new Emperor (Golden Week)</td>
</tr>
<tr>
<td>3rd May</td>
<td>Constitution Memorial Day (Golden Week)</td>
</tr>
<tr>
<td>4th May</td>
<td>Greenery Day, Midori no Hi (Golden Week)</td>
</tr>
<tr>
<td>5th May</td>
<td>Children’s Day, Kodomo no Hi (Golden Week)</td>
</tr>
<tr>
<td>15th July</td>
<td>Marine Day, Umi no Hi</td>
</tr>
<tr>
<td>11th August</td>
<td>Mountain Day, Yama no Hi</td>
</tr>
<tr>
<td>16th 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>14th October</td>
<td>Health-Sports Day, Taiiku no Hi</td>
</tr>
<tr>
<td>22nd October</td>
<td>Enthronement ceremony</td>
</tr>
<tr>
<td>3rd/4th 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.
- In 2019, the Japanese will enjoy a special 10-day Golden Week due to the extra days given around 1st May, when Crown Prince Naruhito should become emperor. As Emperor Akihito is expected to abdicate on 30th April 2019, the Emperor's Birthday on 23rd December 2019 will not be celebrated and moved to 23rd February from 2020. Both the accession (1st May) and the enthronement ceremony (22nd October) will only be celebrated in 2019.
- 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.

4.3 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.
4.3 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.
4.3 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) 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”, March 2017
4.3 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.

Source: CAA Passenger Study 2015
Appendix:
Useful links and further information
Appendix 1: Working with VisitBritain

We can help you extend your reach through:

- Digital and social media such as Youku, WeChat or Pinterest.
- Press and PR by sending us your newsworthy stories or hosting our journalists and broadcast crew.
- 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.
- 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 (visitbritain.org/opportunities)
or trade website (trade.visitbritain.com)
or contact the B2B events team (Email: events@visitbritain.org)
or campaign partnerships team (Email: partnerships@visitbritain.org)
or trade support team (Email: tradesupport@visitbritain.org)
Appendix 1: Working with VisitBritain

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 November 2015.

- **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 ([visitbritain.org/discover-england-fund](http://visitbritain.org/discover-england-fund)).

To find out more information, browse:
- VisitBritain’s mission ([visitbritain.org/overview](http://visitbritain.org/overview))
- The Government’s Tourism Action Plan ([visitbritain.org/governments-tourism-action-plan](http://visitbritain.org/governments-tourism-action-plan))
- VisitBritain’s events ([visitbritain.org/opportunities](http://visitbritain.org/opportunities))
- ‘I Travel For…’ campaign ([visitbritain.org/i-travel-for](http://visitbritain.org/i-travel-for))
- The tourism sector deal bid ([visitbritain.org/industrial-strategy-tourism](http://visitbritain.org/industrial-strategy-tourism))
Appendix 1: Working with VisitBritain

VisitBritain’s global audience segments

In 2017, VisitBritain 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: https://www.visitbritain.org/understanding-our-customers

<table>
<thead>
<tr>
<th>Segments</th>
<th>Global market share</th>
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</thead>
<tbody>
<tr>
<td>Buzzseekers</td>
<td>38%</td>
</tr>
<tr>
<td>Explorers</td>
<td>23%</td>
</tr>
<tr>
<td>Adventurers</td>
<td>16%</td>
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<tr>
<td>Sightseers</td>
<td>12%</td>
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<tr>
<td>Culture Buffs</td>
<td>12%</td>
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Source: Kubi Kalloo, 2017
Appendix 2: Useful research resources

We have dedicated research and insights available which include:

• Latest monthly and quarterly data from the International Passenger Survey by ONS (visitbritain.org/latest-monthly-data
  visitbritain.org/latest-quarterly-data-uk-overall
  visitbritain.org/latest-quarterly-data-area)

• Inbound Tourism Trends by Market
  visitbritain.org/inbound-tourism-trends

• Inbound activity data
  visitbritain.org/activities-undertaken-in-Britain

• Sector-specific research
  visitbritain.org/sector-specific-research

• Britain’s competitiveness
  visitbritain.org/britains-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 pages or
(visitbritain.org/markets-segments)
our inbound research & insights or
(visitbritain.org/inbound-research-insights)
contact us directly
(Email: research@visitbritain.org)
Appendix 2: Useful research resources

We have dedicated market-specific research and insights available which include:

- Planning, decision-making and booking cycle of international leisure visitors to Britain [https://www.visitbritain.org/understanding-international-visitors](https://www.visitbritain.org/understanding-international-visitors)
- Technology and social media [https://www.visitbritain.org/understanding-international-visitors](https://www.visitbritain.org/understanding-international-visitors)
- Gateways in England, insights on overseas visitors to England’s regions, participation in leisure activities, multi-destination trips and more [visitbritain.org/visitor-characteristics-and-behaviour](http://visitbritain.org/visitor-characteristics-and-behaviour)
- Food & drink research [visitbritain.org/inbound-food-drink-research](http://visitbritain.org/inbound-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 pages or [visitbritain.org/markets-segments](http://visitbritain.org/markets-segments) our inbound research & insights or [visitbritain.org/inbound-research-insights](http://visitbritain.org/inbound-research-insights) contact us directly
(Email: research@visitbritain.org)
Appendix 3: Definitions, sources and information on this report

How to read the information in this market profile

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: visitbritain.org/about-international-passenger-survey
- Oxford Economics last updated the ‘Global Travel Service’ databank on 7th November 2018, other information on Japan in January 2019.
- Apex was last updated with December 2018 data.
- UNWTO data are based on their latest Tourism Barometer and Statistical Annex, January 2019.
- VB/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, is carried out online in July 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.
Appendix 3: Definitions, sources and information on this report

How to read the information in this market profile

**Useful definitions and abbreviations**

- **VFR** means Visiting Friends and/or Relatives.
- **Misc** 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 2017. 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

February 2019