VisitBritain VisitEngland

Market and Trade Profile: Japan

January 2022

Destination Bristol ©Gary Newman

Overview

- **'Chapter 1: Inbound market statistics'** provides insights on key statistics about Japanese travellers, where they are going, and who they are. It also takes a look at Britain as a destination and its competitive set.
- **'Chapter 2: Experiences and perceptions'** features details about what visitors from Japan are likely to do in the UK, how they felt during their visit to the UK, and whether they would recommend a stay there to their acquaintances. Perceptions of Britain held by Japanese people in general are also highlighted.
- **'Chapter 3: Understanding the market'** takes a close look at consumer trends in Japan, and the booking, planning and further travel behaviour of this source market. Some details on how to best reach Japanese consumers are indicated, too.
- **'Chapter 4: Access and travel trade'** shows how people from Japan travel to the UK, how to best cater for their needs and wants during their stay, and gives insights into the Japanese travel trade. Further ways of working with VisitBritain and other useful research resources are pointed out in the appendix.

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

Contents

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How to use this document

- VisitBritain's Market Profiles are intended as **comprehensive summaries** of available data and insights for key inbound markets to the UK.
- Data is provided in as much detail as possible, across a range of topics. They are best used as **reference documents**, rather than being read from start to finish. For further information on a market, please consult the links in the Appendix.
- To help the reader to find data which will be helpful to them, we have used signposting and summaries throughout.
- To read key summary data points about this market, turn to the Executive Summary.
- Within each Chapter, there are **summary slides** to introduce data on the following slides.
  - **Chapter 1** summaries: 1, 2, 3
  - **Chapter 2** summaries: 1, 2
  - **Chapter 3** summaries: 1, 2, 3, 4
  - **Chapter 4** summaries: 1

Executive Summary

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1: Inbound market statistics

Chapter summary

- In 2019, Japan retained its ranking of 16th for international tourism expenditure. US$21.3 billion was spent overseas in 2019 by Japanese international travellers.
- Japan was the UK's 23rd largest source market in terms of visits, and 22nd for spend, in 2019. Average spend per visit from Japan was 52% higher than the global average for all inbound visits to the UK from 2017-2019.
- Just over half of visits from Japan to the UK in 2019 were made for holidays, and 28% for business. About 1-in-2 holiday visitors were visiting the UK for the first time.
- Around 1-in-3 Japanese visitors come to the UK in July-September, and seasonal spread tends to follow the global trend.
- Visits are most likely to be between 4 and 7 nights. Over half of the nights Japanese travellers spent in the UK were in a hotel or guest house from 2017-2019.
- London is the favourite destination for visitors from Japan.
- Due to the COVID-19 pandemic, visits to the UK from Japan declined by 76% in 2020. Also, in the first half of 2021, there were 98% fewer visits from Japan than there were in the same period in 2020*. Visits are forecasted to recover to 2019 levels by 2026.

4th

ranking of the UK among European destinations for number of visits from Japan (2019)

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

2: Experiences and perceptions

Chapter summary

- Top activities featuring in visits from Japan to the UK include dining in restaurants, sightseeing famous monuments/buildings and shopping. They are more likely than other visitors to watch live art performances, such as a ballet, an opera or a musical.
- Many Japanese people decide to visit Britain because of its cultural attractions, because it is somewhere where English is spoken, somewhere new, and somewhere that is safe and secure.
- Over 1-in-3 Japanese think a trip to the UK would be “fascinating” if they visited. Museums are the cultural product they associate the most with Britain.
- Japanese people tend to look for laughter, and also landscapes and natural beauty when on holiday. The most preferred destination for Japanese travellers is Hawaii, but Australia and the USA are also well placed for delivering what they most want from a holiday.

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

In 2020, Japanese people ranked the UK

3rd

for its overall brand image

3: Understanding the market

Chapter summary

- Japan has the world's 3rd largest economy by nominal GDP, and is ranked among the world's most innovative countries. The COVID-19 pandemic sent Japan's GDP into a decline of 4.7% in 2020; however, forecasts predict that full recovery may be achieved in the second half of 2021.
- Japan has one of the lowest birth rates in the world and its population is expected to decrease slightly. The Japanese population is ageing. Forecasts from the United Nations suggest that the country's median age will be 52 by 2030. This has an impact on consumer and travel trends.
- Pre COVID-19, men and women in their 20s, and women in their 50s, were most likely to say that they hoped to increase their spending on travel in the coming year. A strong employment environment had benefited young people's incomes, and older women who had finished raising their children looked to take advantage of time of their own.
- In the spring of 2021, 42% of Japanese respondents planned to travel internationally for a leisure trip in the next 12 months, and Britain was ranked 5th within Europe as a next destination choice. A decrease in coronavirus cases at the destination is most likely to trigger international travel for Japanese respondents.

Source: Oxford Economics, United Nations World Population Prospects, TCI/VisitBritain/VisitScotland/Visit Wales/London&Partners 2021

70%

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

4: Access and travel trade

Chapter summary

- Most visitors from Japan came by plane to the UK (87% in 2019), but a minority came by Eurostar, which hints at a combined trip to the UK and continental Europe.
- Seat capacity on direct, non-stopping flights from Japan to Britain shrank from 2009 to 2015, but grew once again by 27% up to 2019. In 2019, flights linked Tokyo and Osaka to London, and were split quite equally between British Airways flights and local carriers.
- Due to the COVID-19 outbreak, seat capacity between Japan and the UK was down by 59% in 2020 compared to 2019. Seat capacity in 2021 was 60% lower than 2019. However, seat capacity increased in the second half of 2021, and is scheduled to increase further in early 2022.
- For long-haul travel most Japanese travellers will still turn to agencies to plan all or part of their trip. The Japanese travel trade is highly regulated, with high levels of customer protection. Understanding Japanese culture and building personal relationships are key to success in working with the trade. There are two main periods in the year when brochures are written: October-March and April-September.
- The market is maturing though: as customers are more knowledgeable about destinations, travel companies have to adapt and are now more specialised and customer-centric.

Source: Apex, International Passenger Survey by ONS

27%

growth in seat capacity between 2015 and 2019 on direct, non-stopping routes between Japan and the UK

Inbound market statistics

Chapter 1

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1.1 Key statistics

Key insights

- From 2009-2019, inbound visits from Japan increased by 43%, with a record in 2017. Japan's record for spend was in 2018. Japanese visitors are high spenders; from 2017-2019, their average spend per visit was £1,036, 52% higher than the all-market average.
- The most popular time for the Japanese to visit the UK is July-September (30% of visits in 2019 were made in that quarter).
- Just over half of visits from Japan to the UK were for holidays, followed by business visits (28% in 2019). Business visitors spend the most per night among all journey purposes.
- London is by far the leading destination for a trip to Britain: visitors from Japan spent 60% of their nights in the UK in 2017-2019 in London.
- About 1-in-2 Japanese holiday visitors have been to the UK before.

+43%
visits from Japan to the UK from 2009-2019

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

1.1 Key statistics: global context and 10 year trend

Global context

Measure	2019
International tourism expenditure (US$bn)	21.3
Global rank for international tourism expenditure	16
Number of outbound overnight visits (m)	25.5
Most visited destination	USA
Most visited destination in Europe	Spain

Inbound travel to the UK overview

Measure	Visits (000s)	Nights (000s)	Spend (£m)
10-year trend	+43%	-18%	-12%
2009	272	3,304	420
2010	289	2,448	237
2011	299	2,471	246
2012	338	4,116	421
2013	323	3,283	314
2014	348	2,646	366
2015	323	3,462	372
2016	368	3,422	331
2017	433	3,306	429
2018	429	3,398	497
2019	389	2,708	369
Share of UK total in 2019	**1.0%**	**0.9%**	**1.3%**

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

1.1 Key statistics: volume and value

Inbound volume and value

Measure	2019	Change vs. 2018	Rank out of UK top markets
Visits (000s)	389	-9%	23
Nights (000s)	2,708	-20%	30
Spend (£m)	369	-26%	22

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

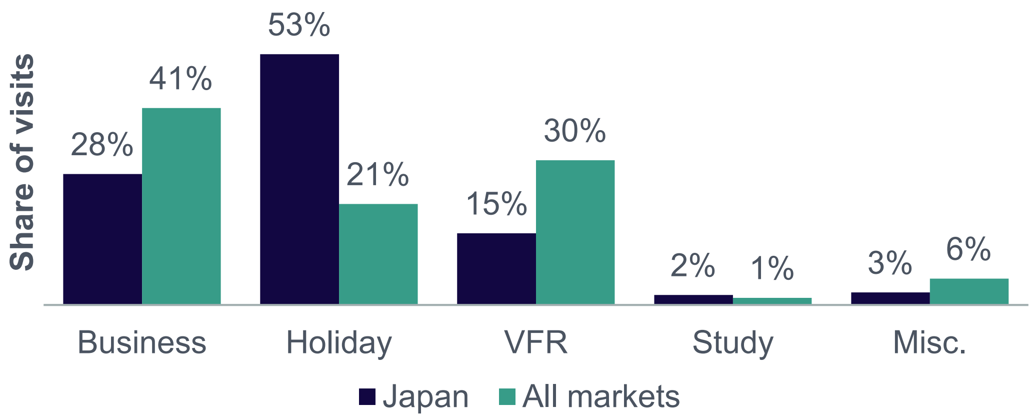
Key metrics by journey purpose (2017-2019)

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

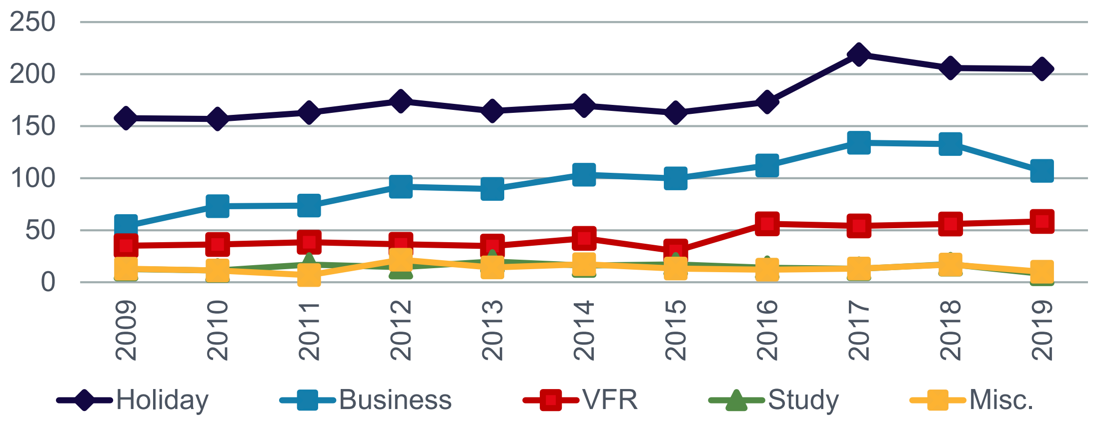
Source: International Passenger Survey by ONS, *provisional data for January-March 2020 *small base **small base, air departures only for 2021

1.1 Key statistics: journey purpose

Journey purpose 2019



Journey purpose trends (visits 000s)



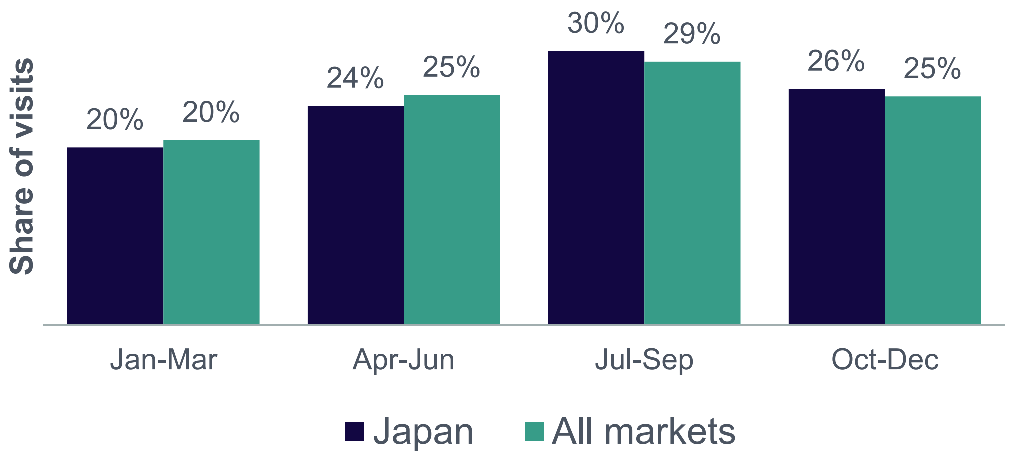
- Most visits from Japan to the UK are made for leisure: just over half were made for holidays and 15% to visit friends or relatives. However, business is the second-most common reason for which the Japanese visit the UK, comprising 28% of all Japanese visits in 2019.
- Japanese visitors were half as likely to be visiting friends and relatives in the UK than the all-market average in 2019. Other visits were made for study (2%), or miscellaneous purposes (3%).

- In 2019, overall visits from Japan fell by 9% when compared to 2018, the number of holiday visits remained stable, VFR visits grew by 5% and business visits declined by 19%.
- Japanese business visitors spend the most per night out of all journey purposes, at £196. VFR visitors stay longer in the UK than both holiday and business visitors, but spend less per night and per visit.

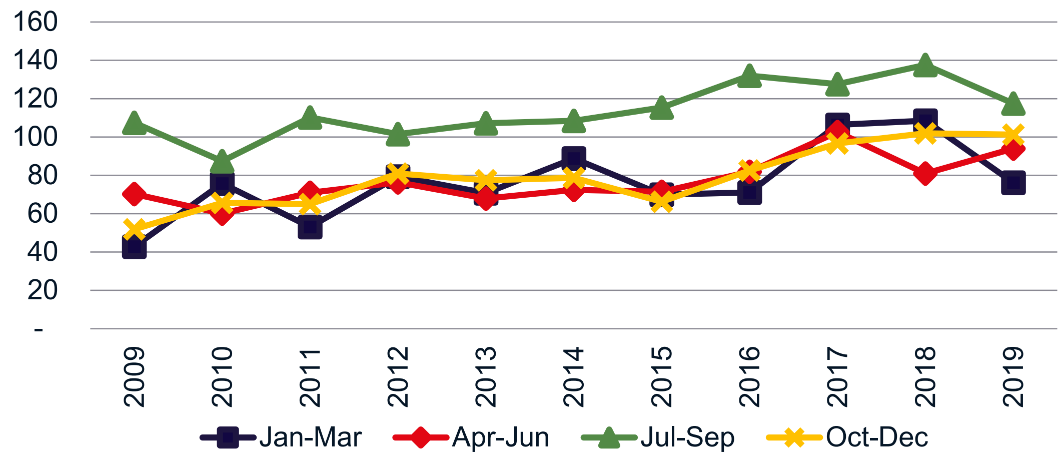
Source: International Passenger Survey by ONS

1.1 Key statistics: seasonality

Seasonality 2019



Seasonality trend (visits 000s)

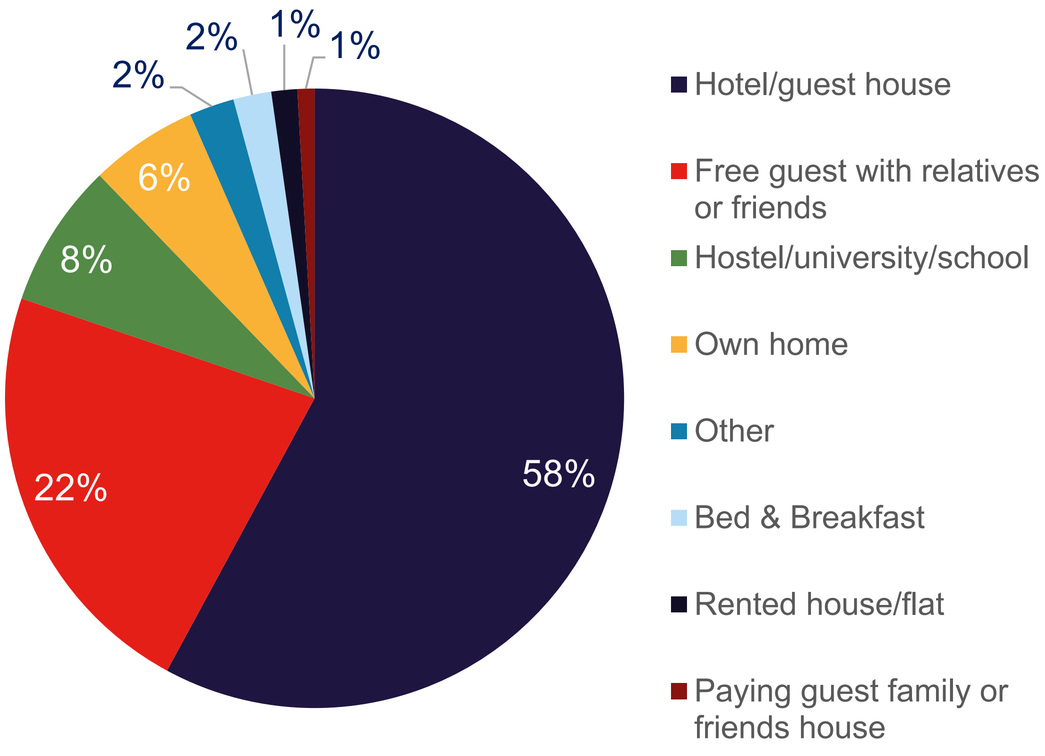


- The most popular time for Japanese visitors to come the UK is in the summer months: in 2019, just under a third of visits from Japan to the UK were made between July and September, slightly above the global average.
- The autumn months are also quite popular with 26% of visits made between October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

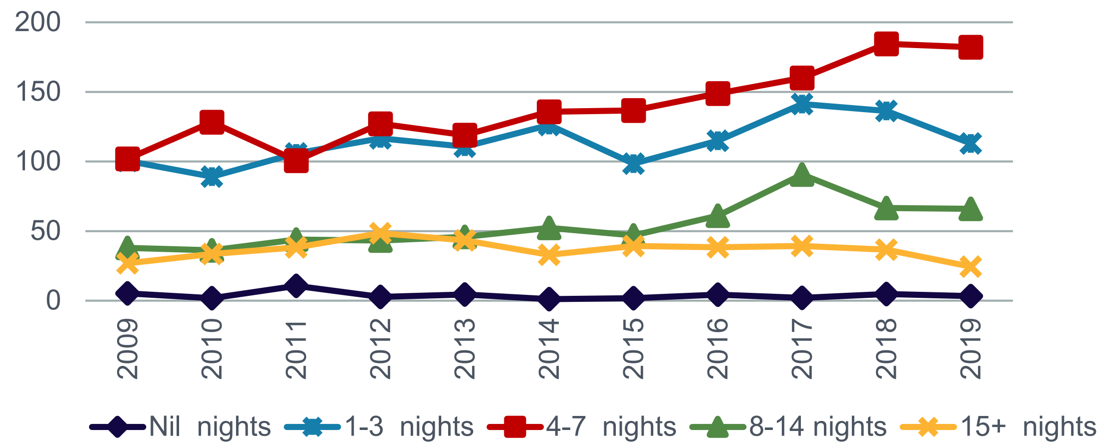
Source: International Passenger Survey by ONS

1.1 Key statistics: length of stay and accommodation

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



Duration of stay trend (visits 000s)

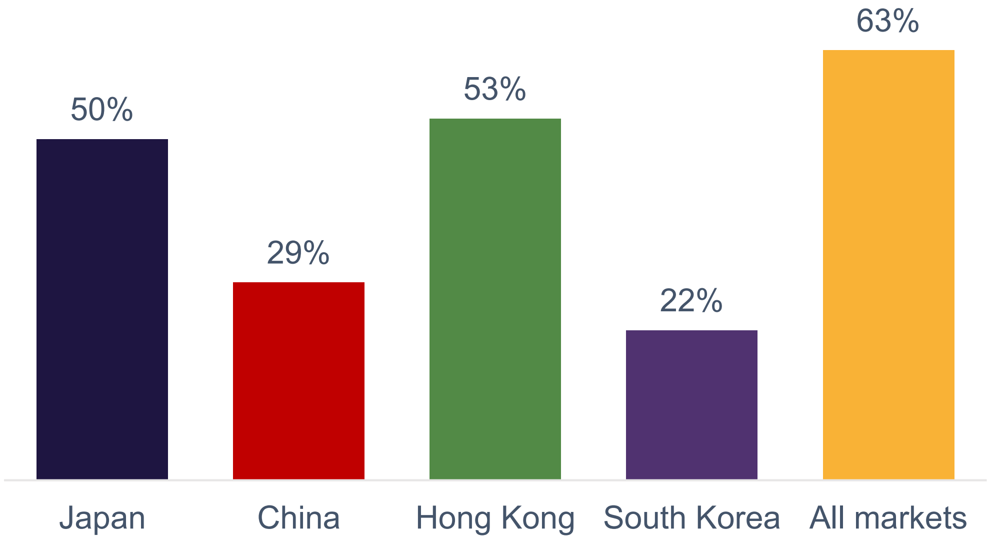


- Japanese visitors are most likely to stay in the UK between 4 and 7 nights, and this duration has been most prominent in all years in the last decade apart from 2011. 1-3 nights is the next most prominent visit duration. The volume of visitors staying for 8-14 nights has declined since 2017.
- In 2019,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

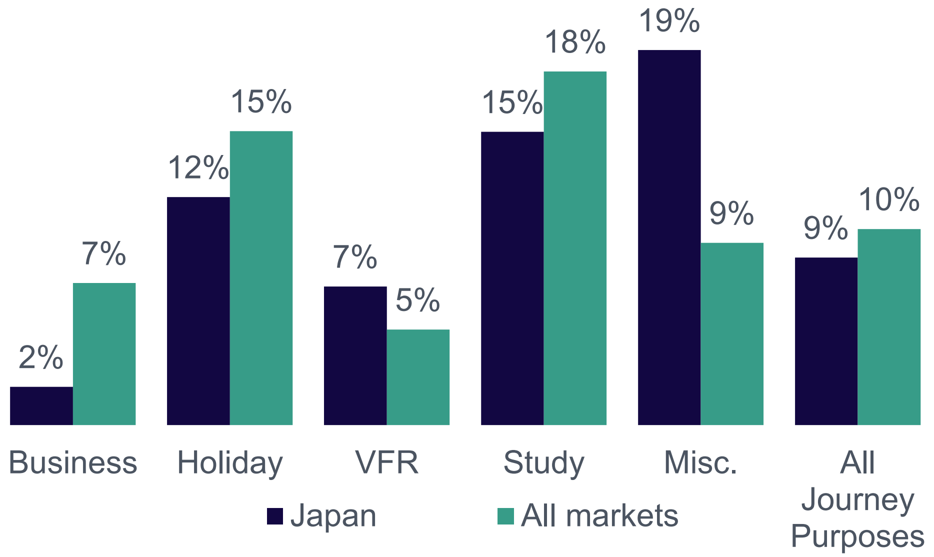
Source: International Passenger Survey by ONS

1.1 Key statistics: repeat visits and package tours

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



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



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

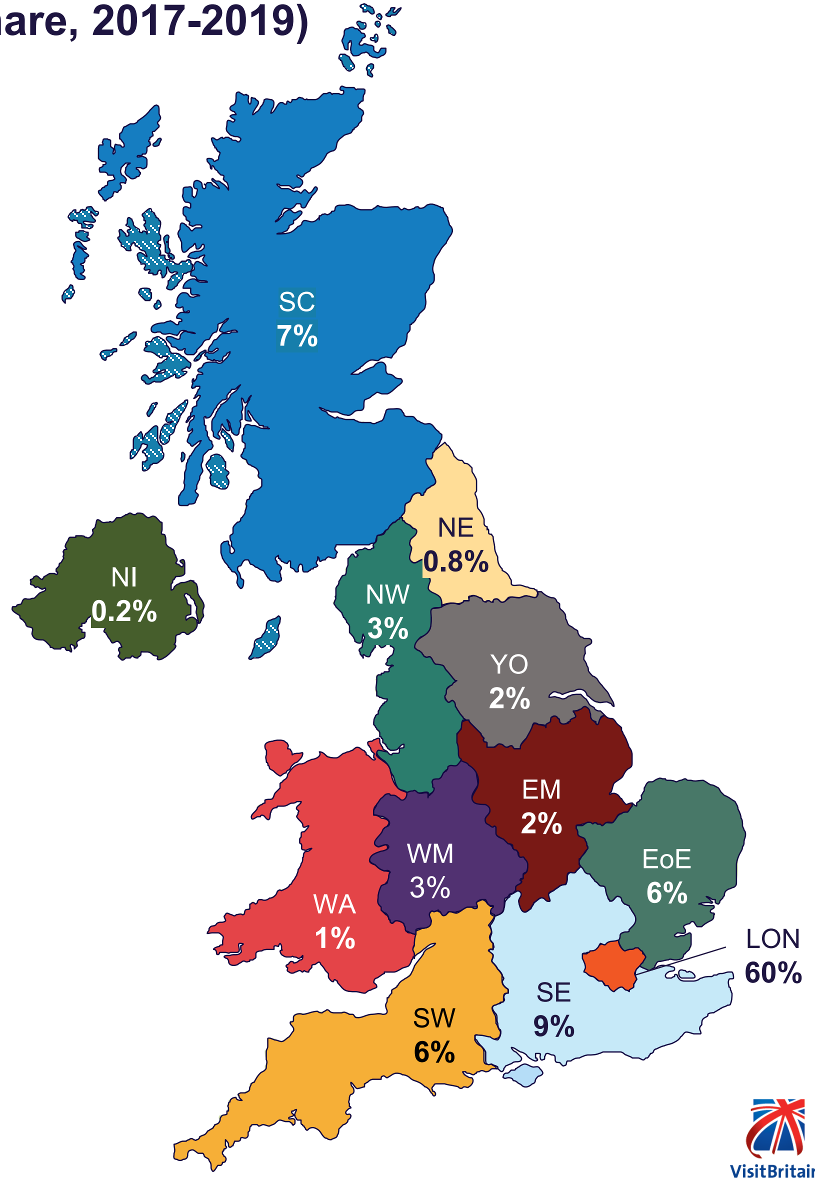
International Passenger Survey by ONS. *2015, excluding British nationals;
**See definition of a package holiday in appendix

1.2 Getting around Britain

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

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

Nights (% share, 2017-2019)



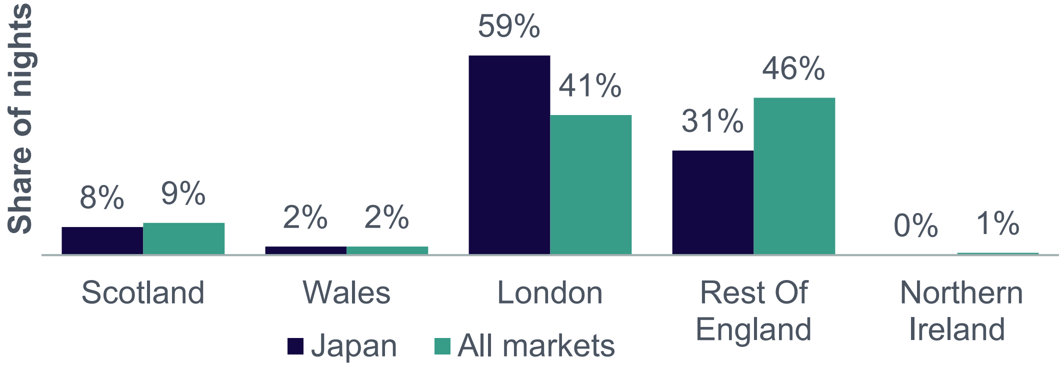
Source: International Passenger Survey by ONS

1.2 Getting around Britain: regional spread and top towns/cities

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

Town	Visits (000s)
London	319
Edinburgh	18
Manchester	13
Glasgow	11
Cambridge	10

Regional spread 2019

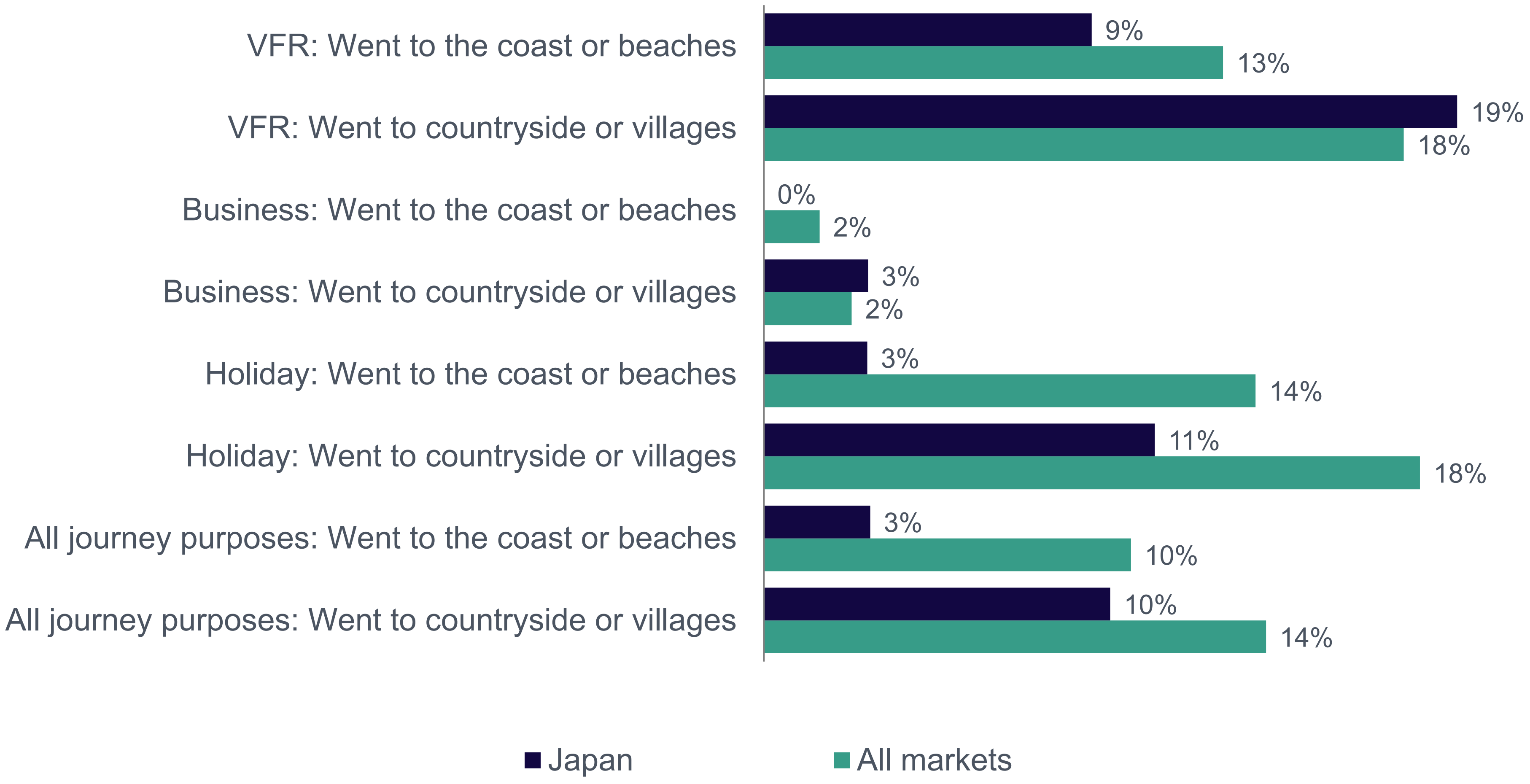


Source: International Passenger Survey by ONS

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

1.2 Getting around Britain: visits to coast, countryside and villages

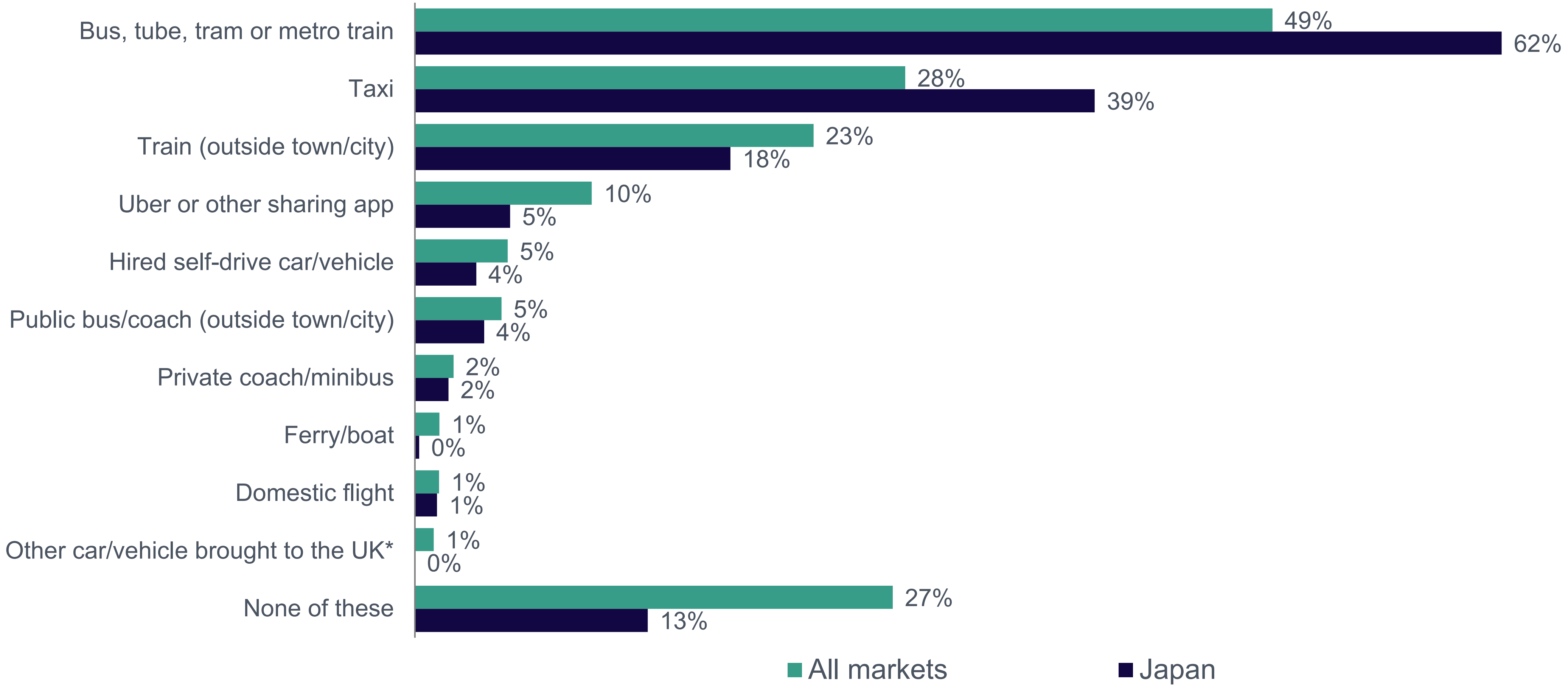
Propensity to visit coast, countryside and villages



Source: International Passenger Survey by ONS 2016

1.2 Getting around Britain: use of internal modes of transport

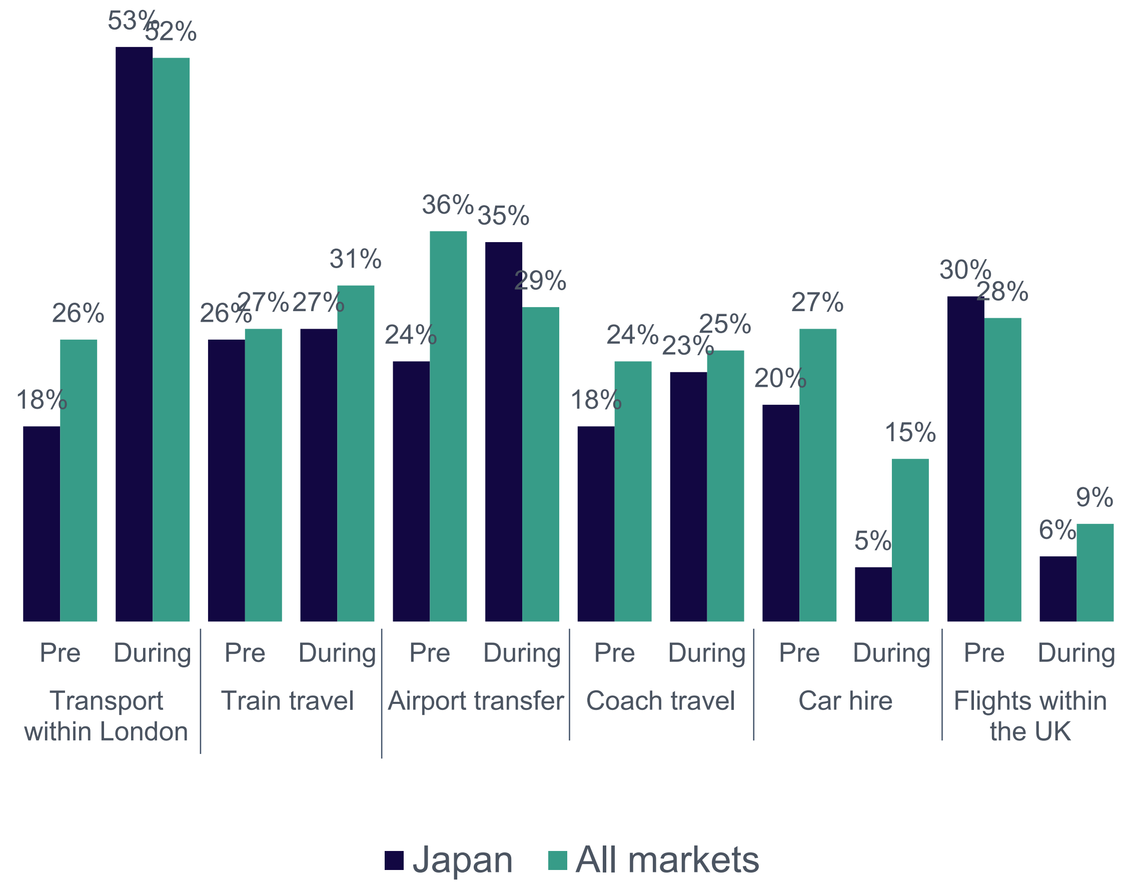
Propensity to use internal modes of transport



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

1.2 Getting around Britain: purchase of transport

Transport services purchased before or during trip (%)



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

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

1.3 Visitor demographics

Visitor characteristics

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

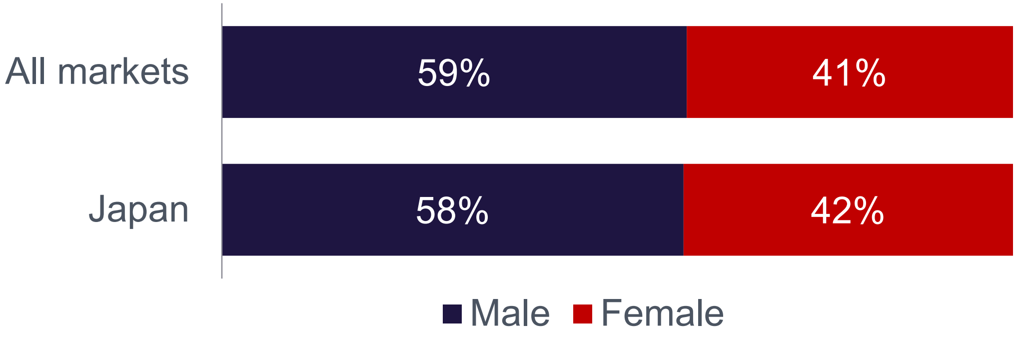
66%

Of visits from Japan to the UK originated in the Greater Tokyo Metropolitan Area

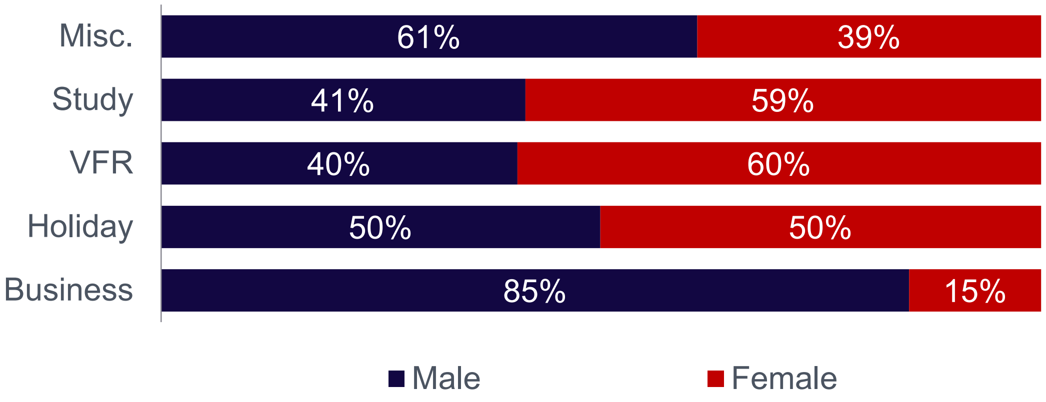
Source: International Passenger Survey by ONS, Oxford Economics

1.3 Visitor demographics: gender and age groups

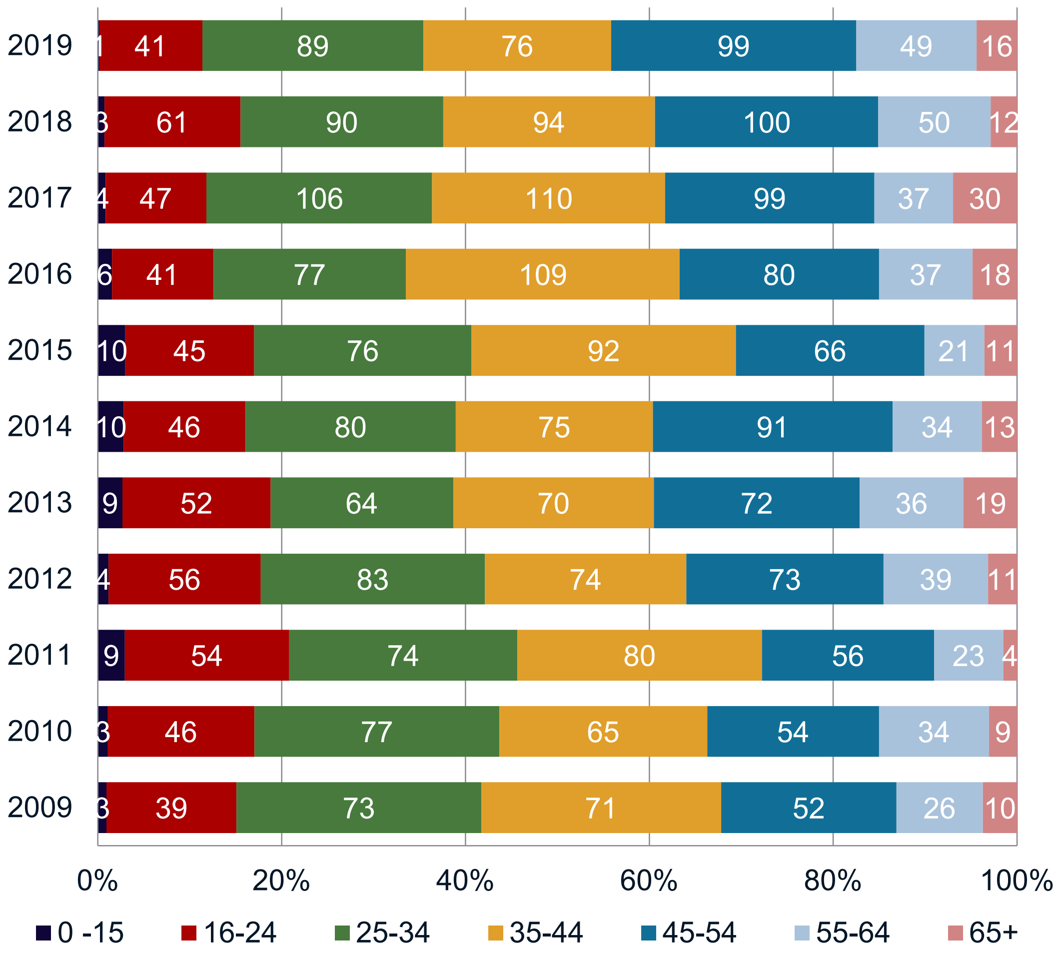
Gender ratio of visits (2019):



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



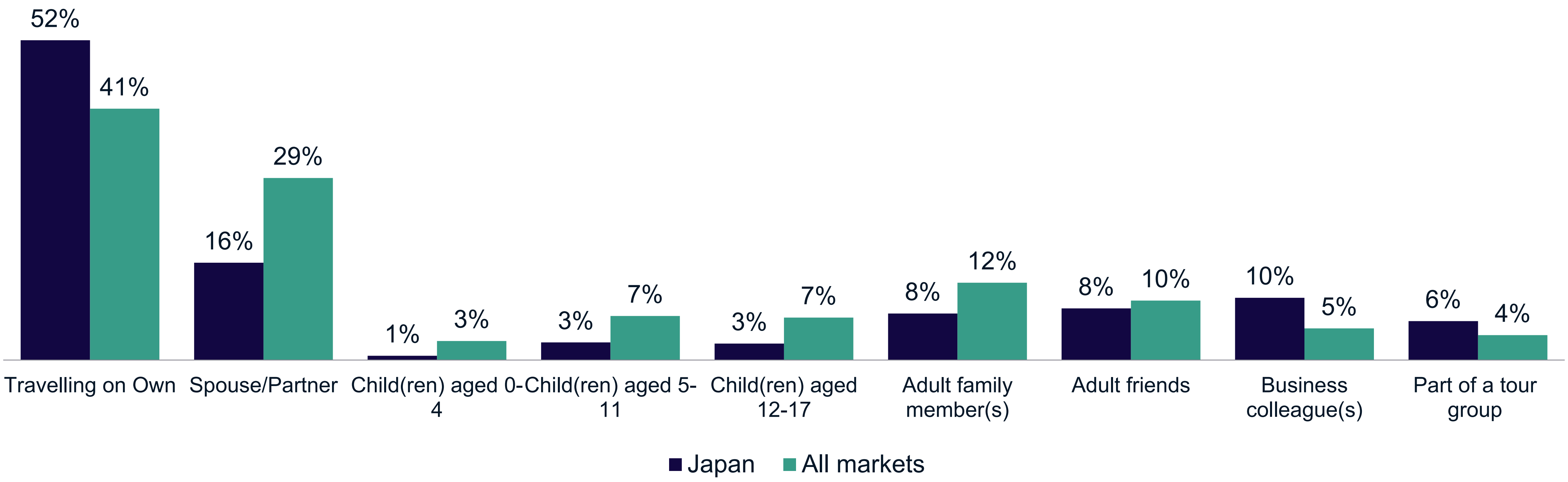
Age group trend (visits in 000s)



Source: International Passenger Survey by ONS

1.3 Visitor demographics: travel companions

Who have Japanese visitors to the UK travelled with?



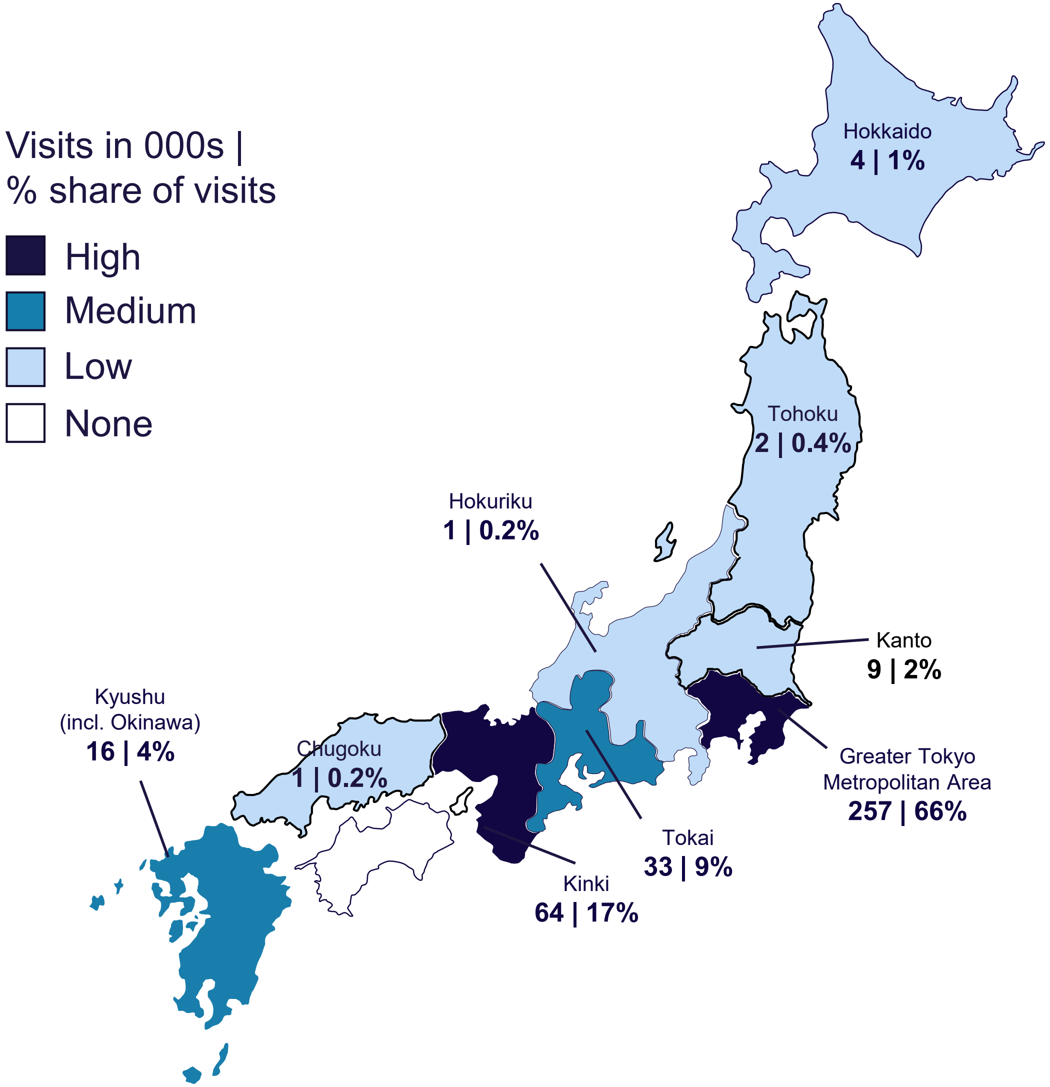
Japanese visitors are most likely to be travelling on their own, and over-index on solo travel compared to other markets. They are also more likely to travel with business colleagues, or as part of a tour group. In contrast, they under-index when it comes to travelling with a spouse/partner, children,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

Source: International Passenger Survey by ONS, 2017. "Who accompanied you on your visit to the UK, excluding UK residents you may have visited during your trip?"

1.3 Visitor demographics: Origin

Visits to the UK (2018)

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



Source: International Passenger Survey by ONS 2018, CIA World Factbook

1.4 The UK and its competitors (1)

Market size, share and growth potential

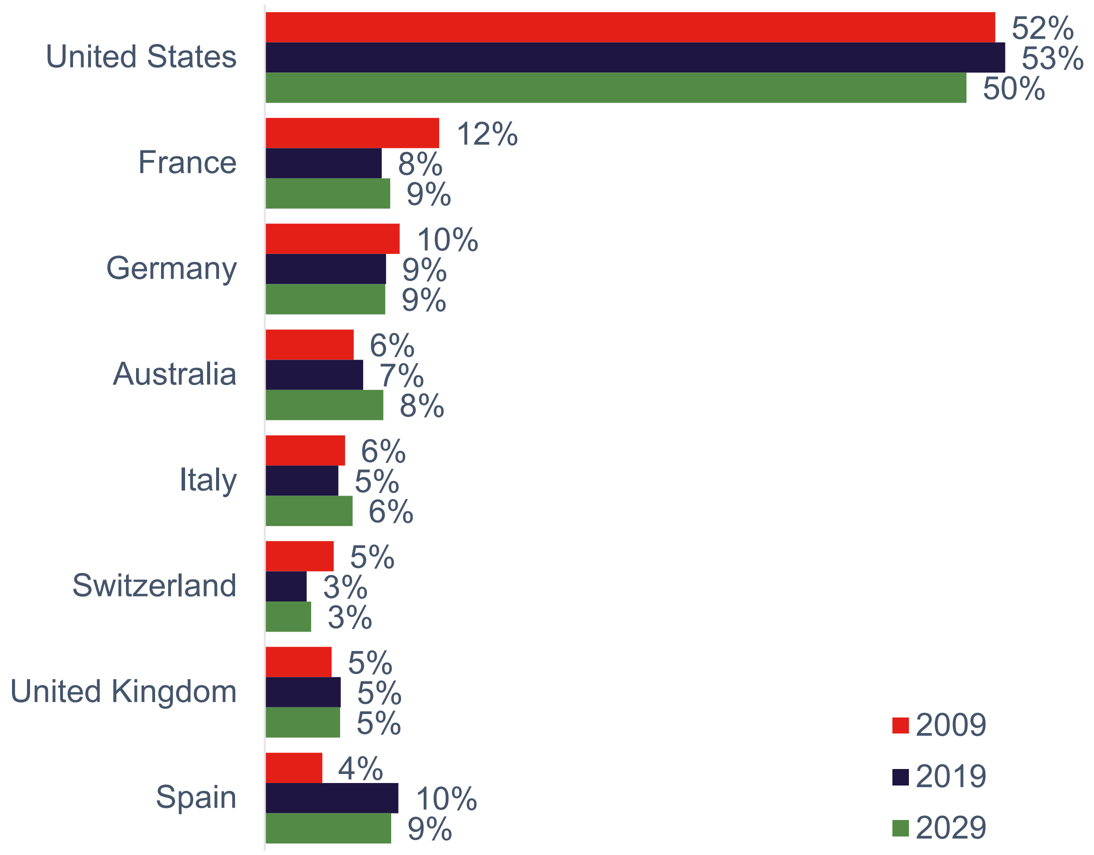
- The UK was the 4th most visited destination in Europe by Japanese travellers for overnight trips in 2019, behind Spain, Germany, and France.
- Before 2020, the Japanese outbound market was growing; global overnight visits from this market grew by 27% from 2009 to 2019.
- However, due to the COVID-19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

The UK ranks
4th
Most visited destination in Europe from Japan

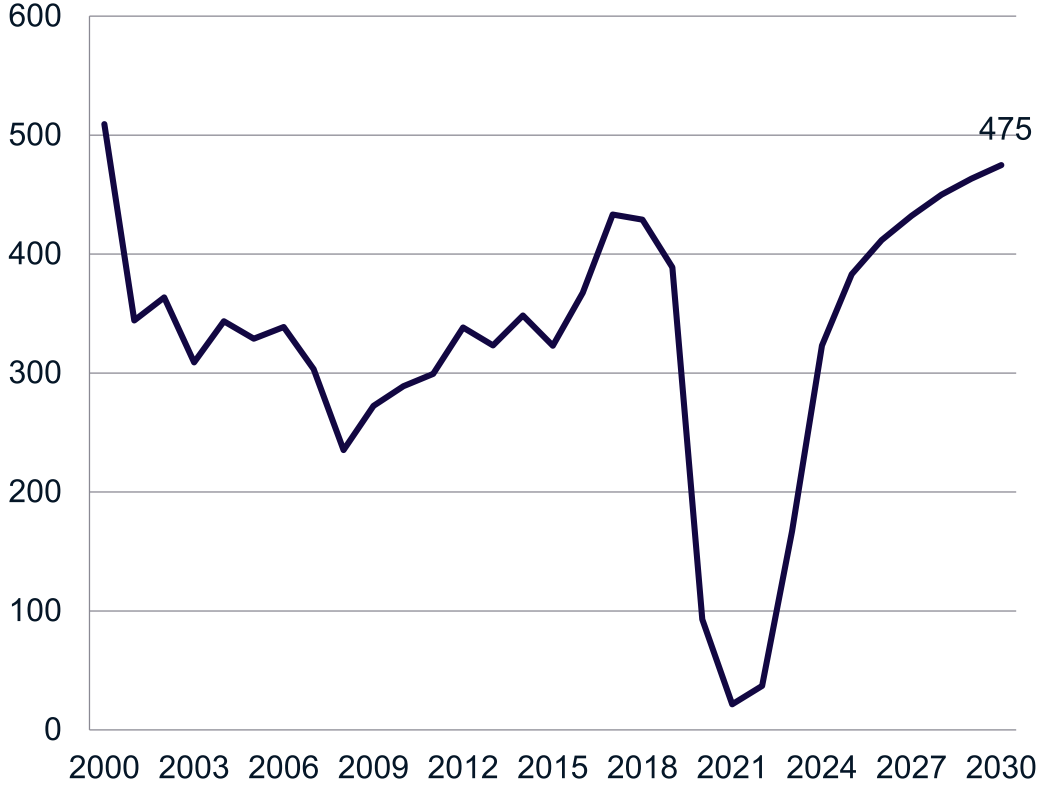
Source: Oxford Economics

1.4 The UK and its competitors (2)

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



Historic and potential visits to the UK (000s)



Source: Oxford Economics for competitor set based on overnight visits, 'Historic and potential visits' displays total visits based on International Passenger Survey historic data and Oxford Economics forecasts with VisitBritain adaptations

Experiences and perceptions

Chapter 2

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2.1 Inbound activities: summary

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

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

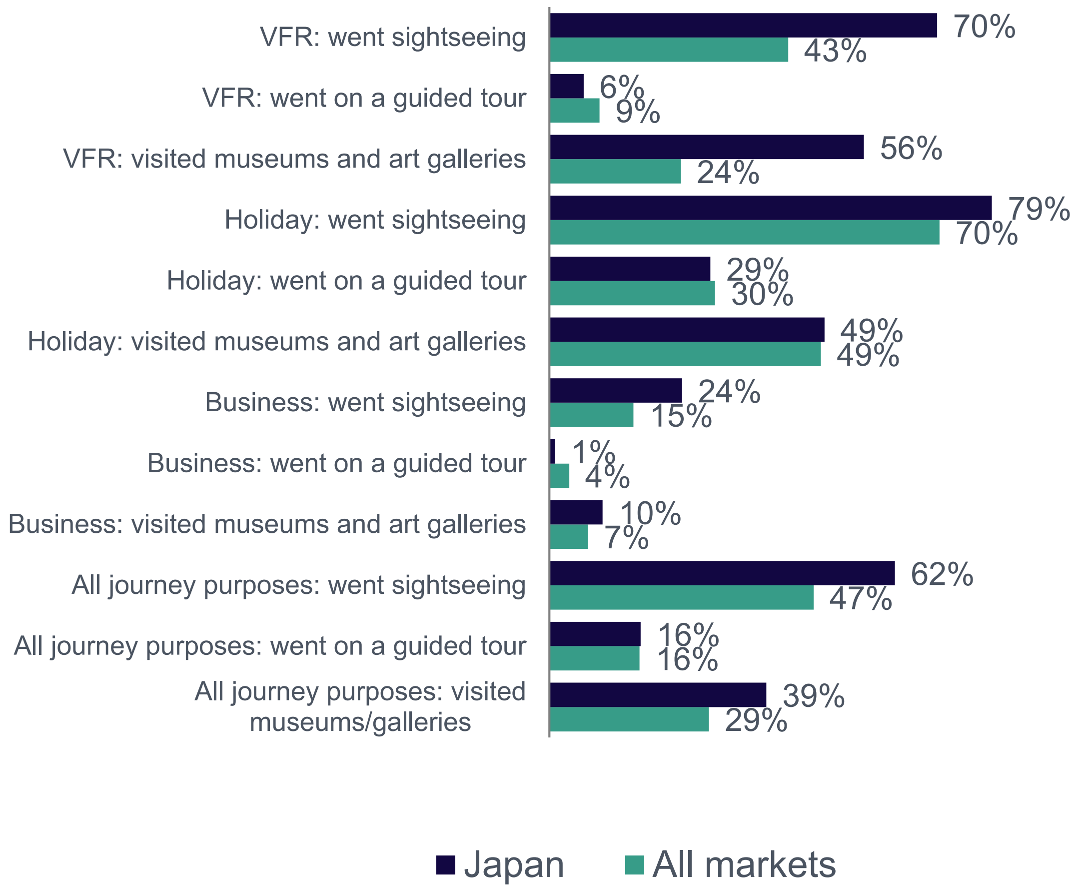
1. Dining in restaurants
2. Sightseeing famous monuments/buildings
3. Shopping
4. Visiting museums or art galleries
5. Visiting castles or historic houses
6. Going to the pub
7. Visiting parks or gardens
8. Having a traditional afternoon tea
9. Socialising with the locals
10. Walking in the countryside

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

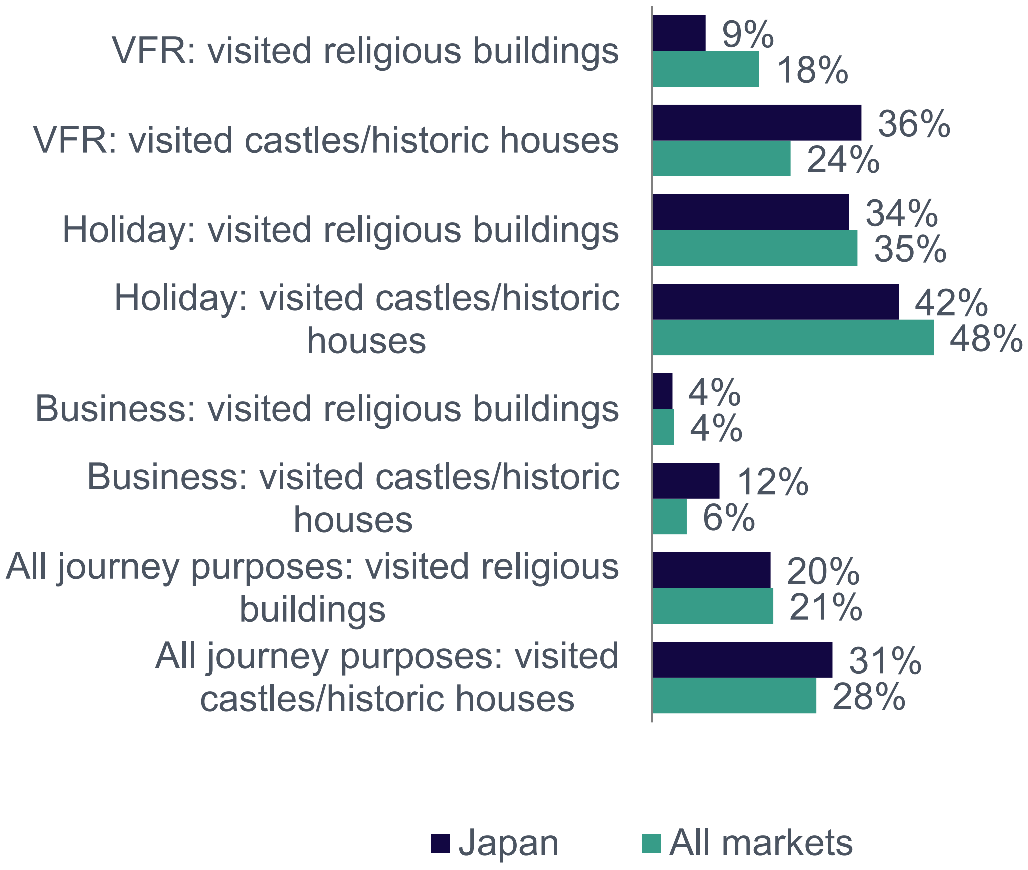
Source: International Passenger Survey by ONS, rankings based on 2007-2019 data

2.1 Inbound activities: tourism and heritage

Propensity to visit museums and galleries



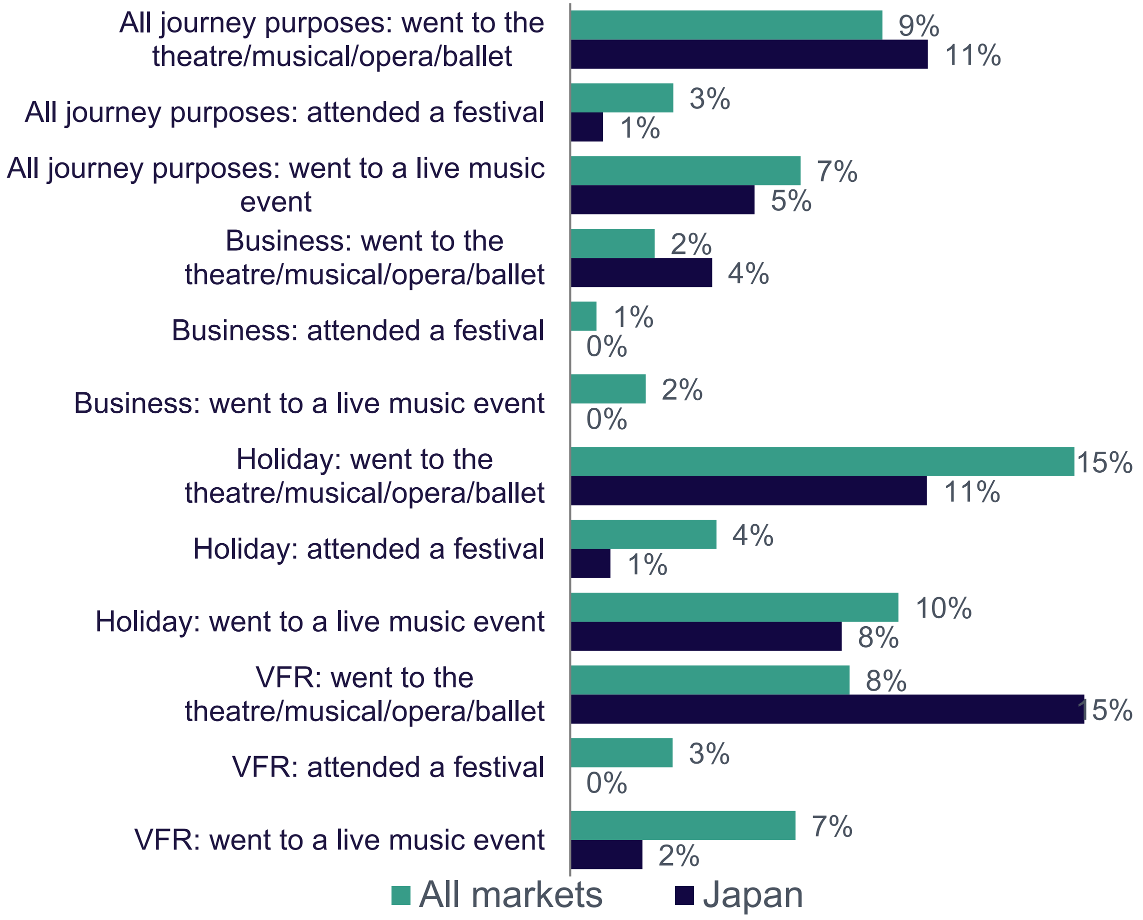
Propensity to visit built heritage sites



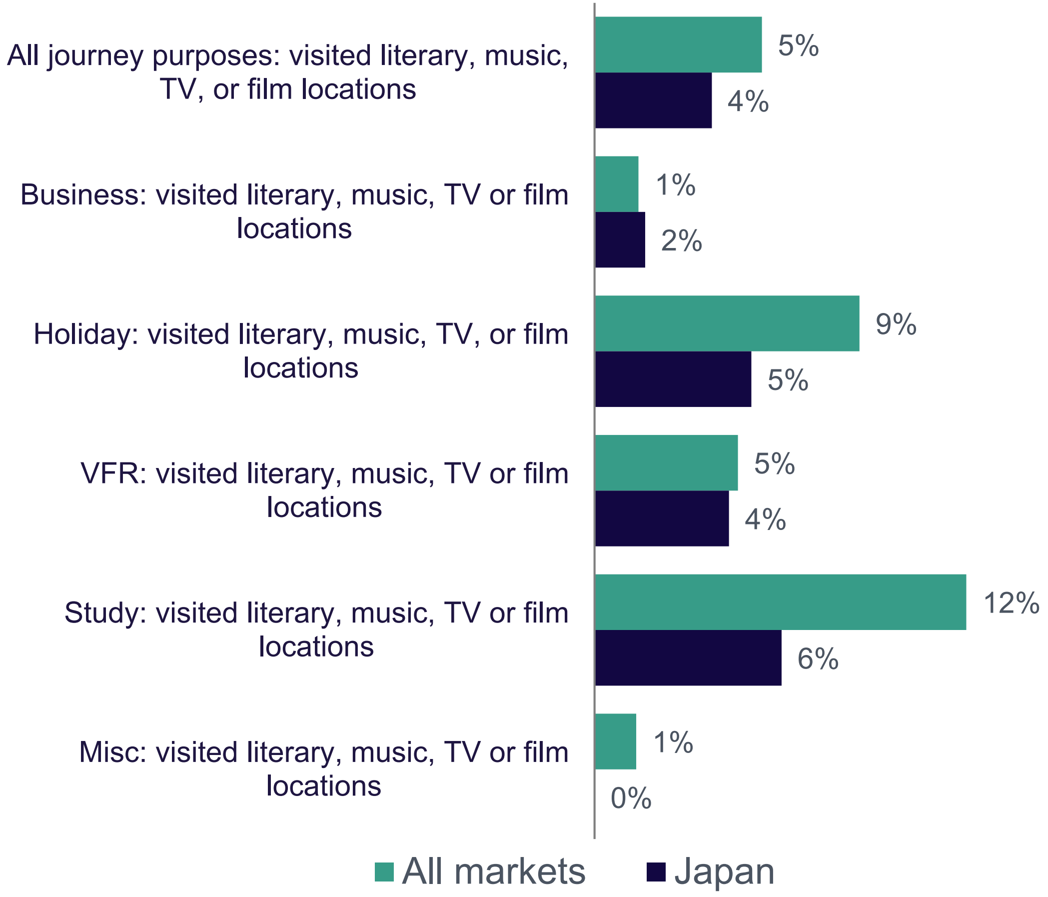
Source: International Passenger Survey by ONS, 2016

2.1 Inbound activities: culture

Propensity to attend the performing arts



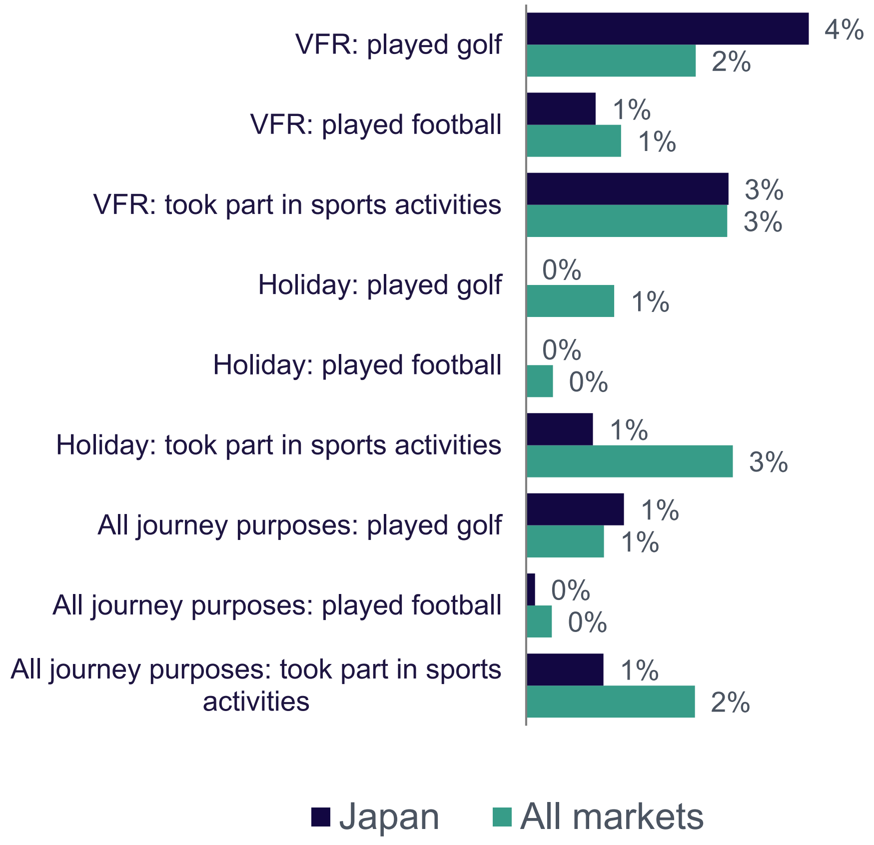
Propensity to participate into other culture-related activities



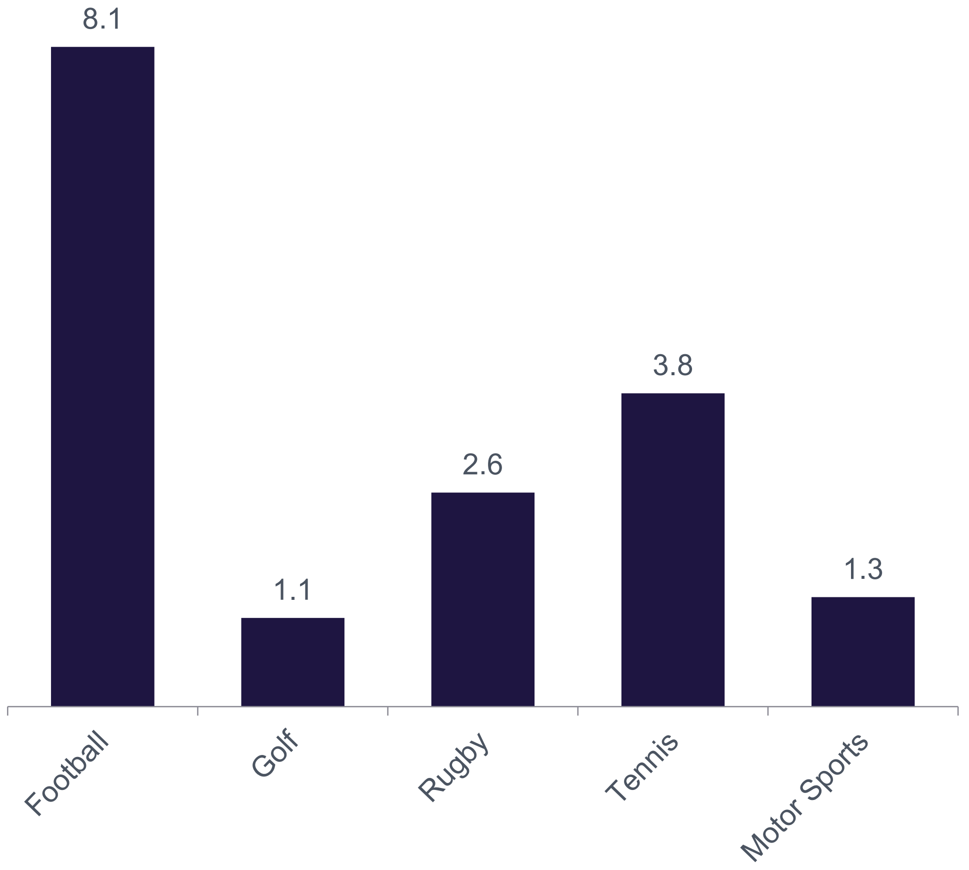
Source: International Passenger Survey by ONS, 2016 (performing arts) and 2013 (watch sport live)

2.1 Inbound activities: sports

Propensity to partake in sports-related activities



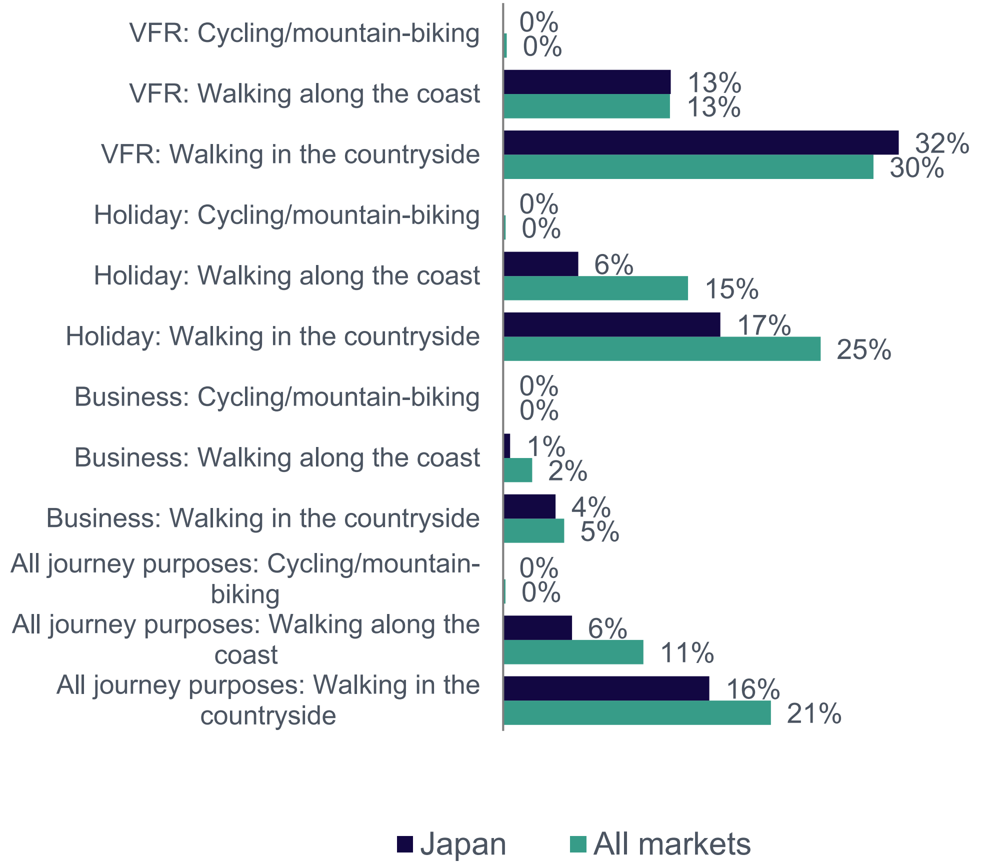
Number who watched sports live during trip (000s)



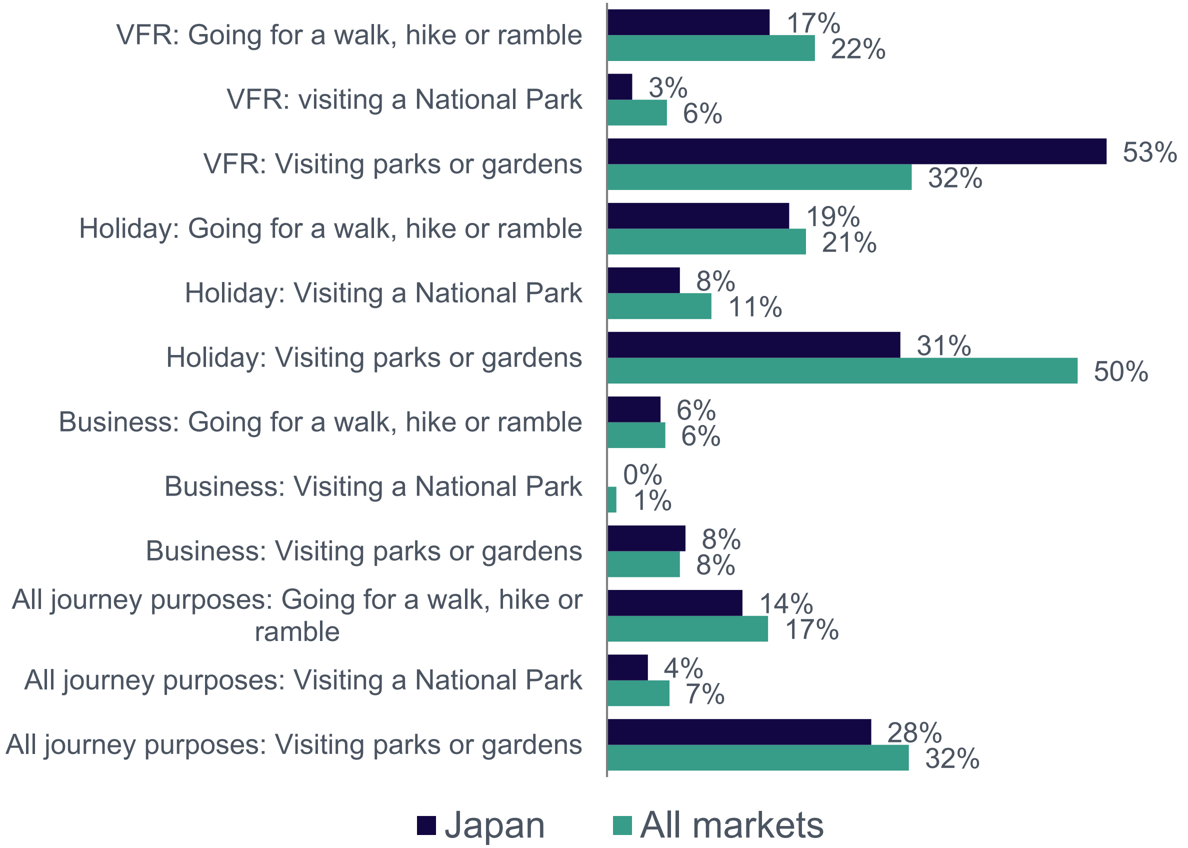
Source: International Passenger Survey by ONS, 2016 (performing arts) and 2019 (watch sport live)

2.1 Inbound activities: outdoors

Propensity to go for a walk or cycle



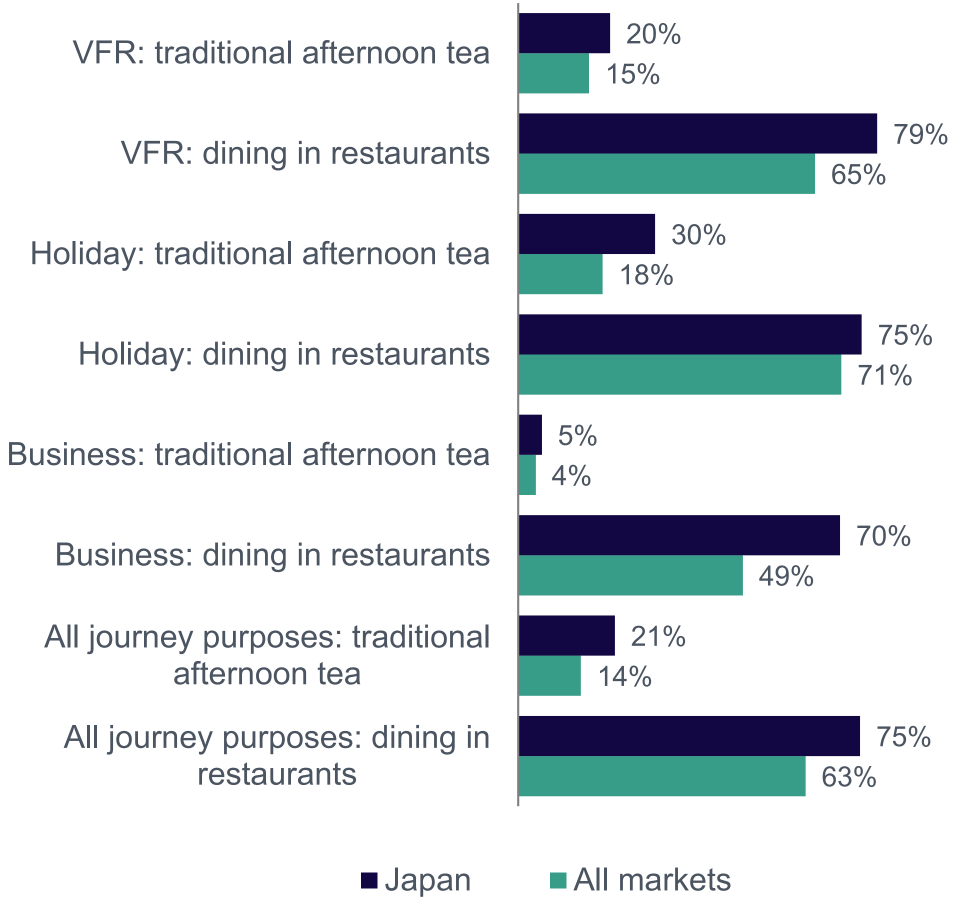
Propensity to enjoy the outdoors



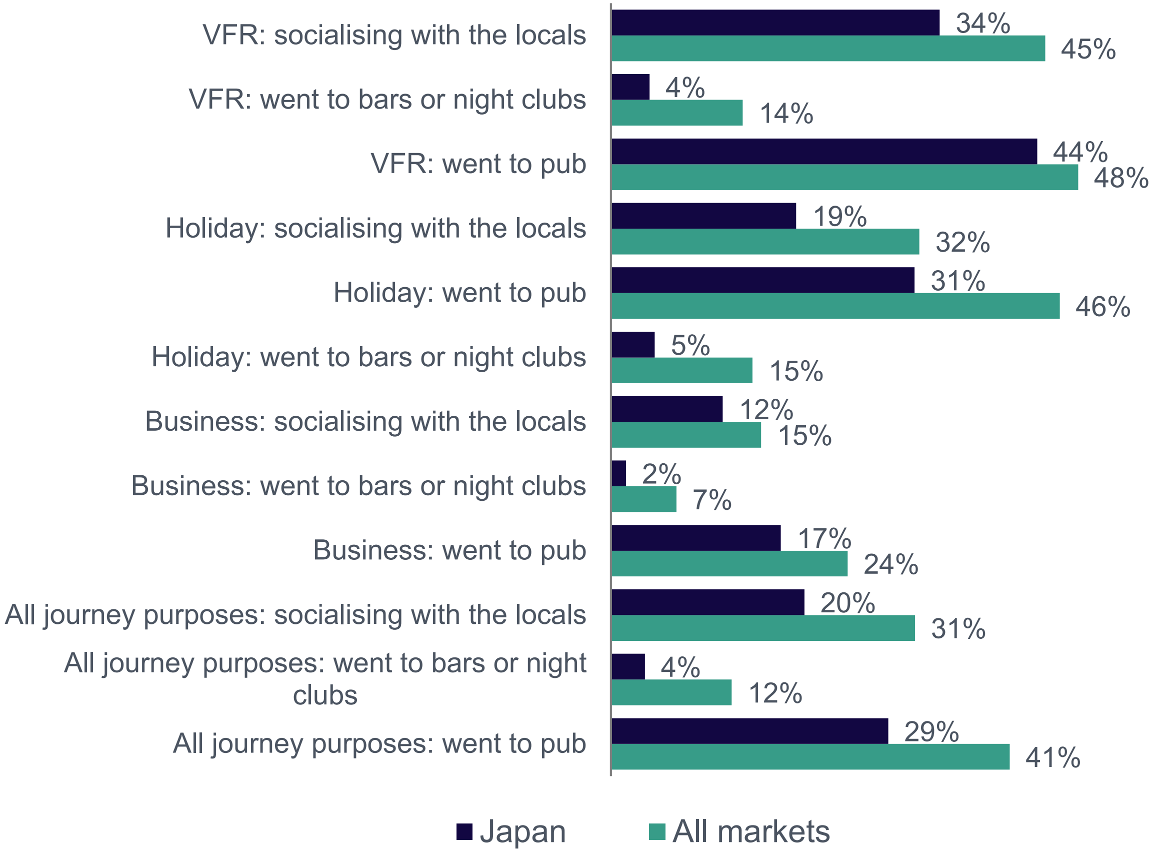
Source: International Passenger Survey by ONS, 2016 (visiting parks and gardens and a national park), 2010 (walking along the coast) and 2007 (walking in the countryside)

2.1 Inbound activities: going out

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



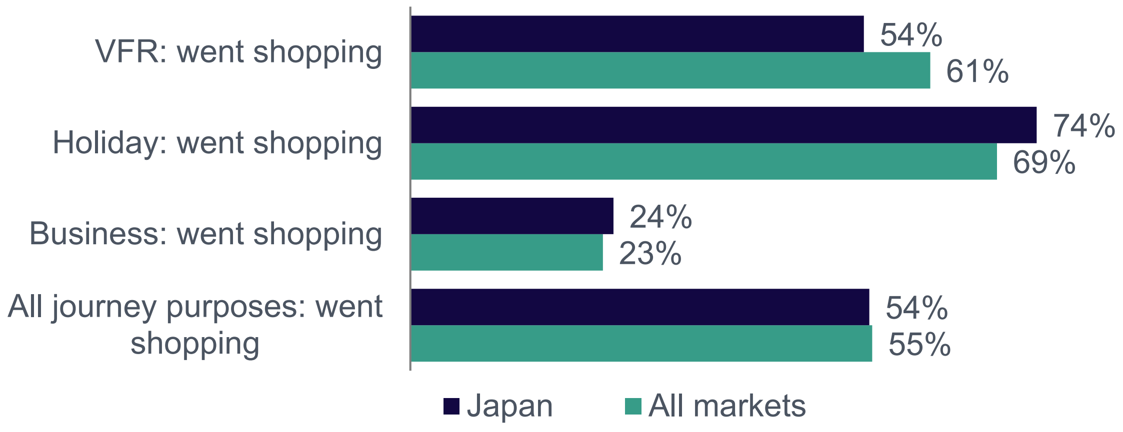
Propensity to go to the pub or bars and night clubs, or to socialise with locals



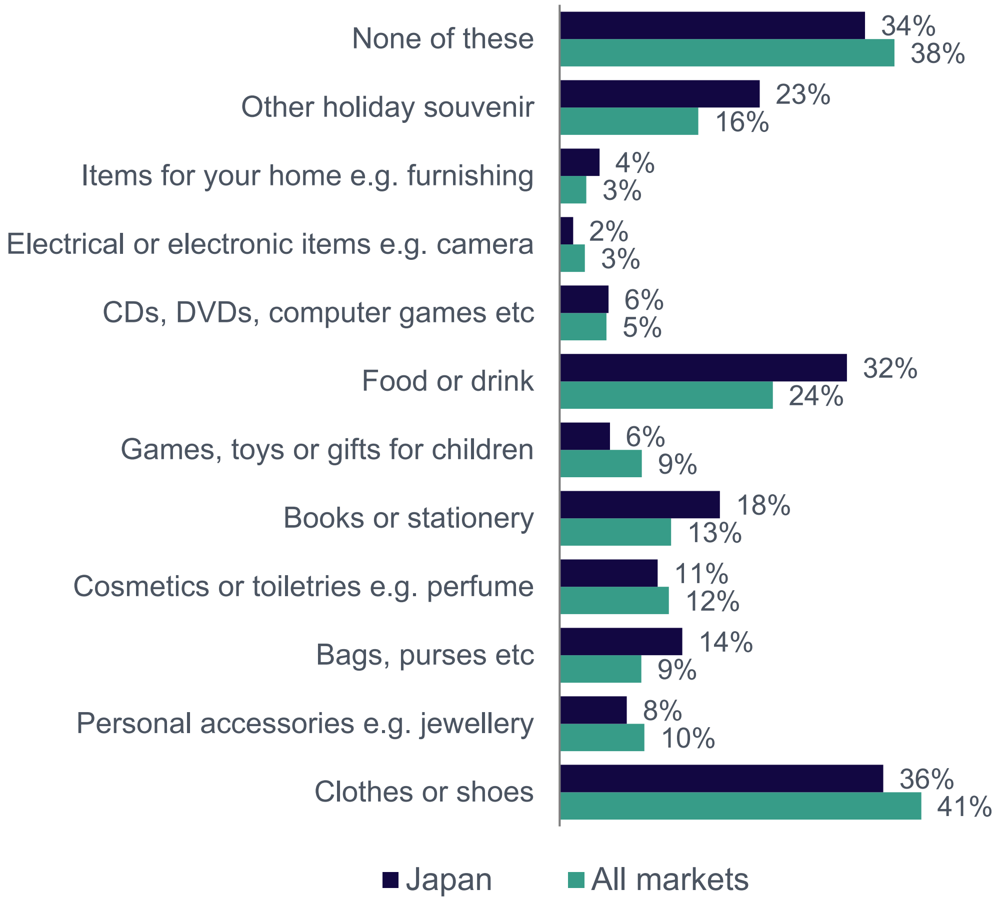
Source: International Passenger Survey by ONS, 2008 (dining in restaurants) and 2017 (all other activities)

2.1 Inbound activities: shopping

Propensity to go to shopping



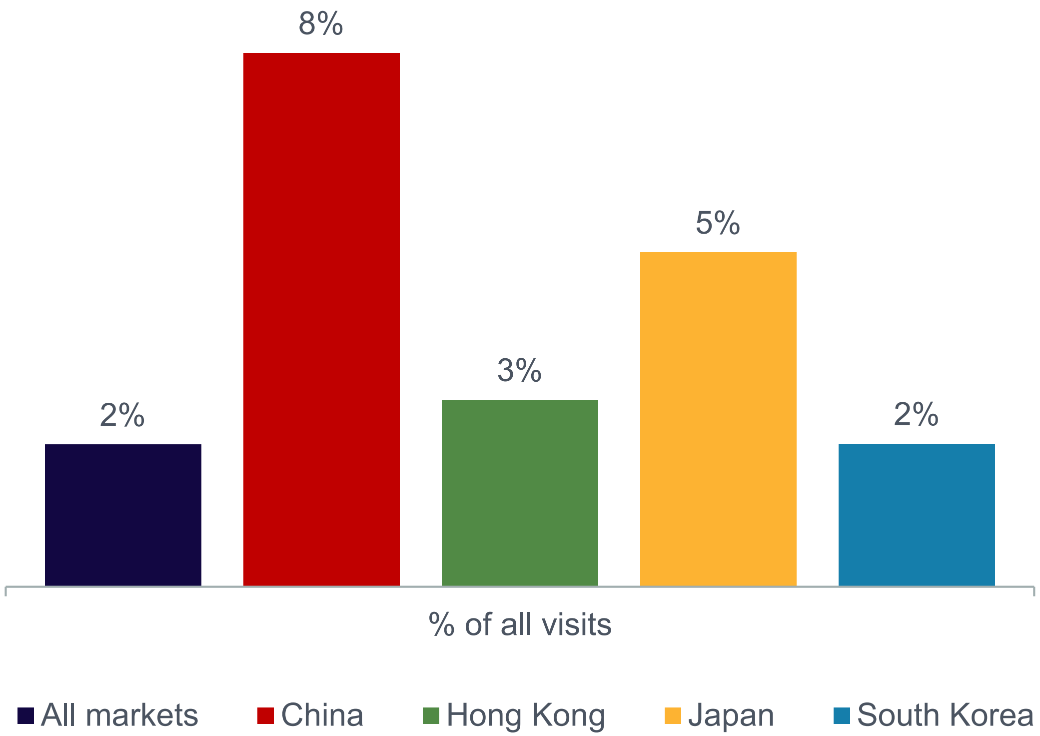
Propensity to purchase selected items



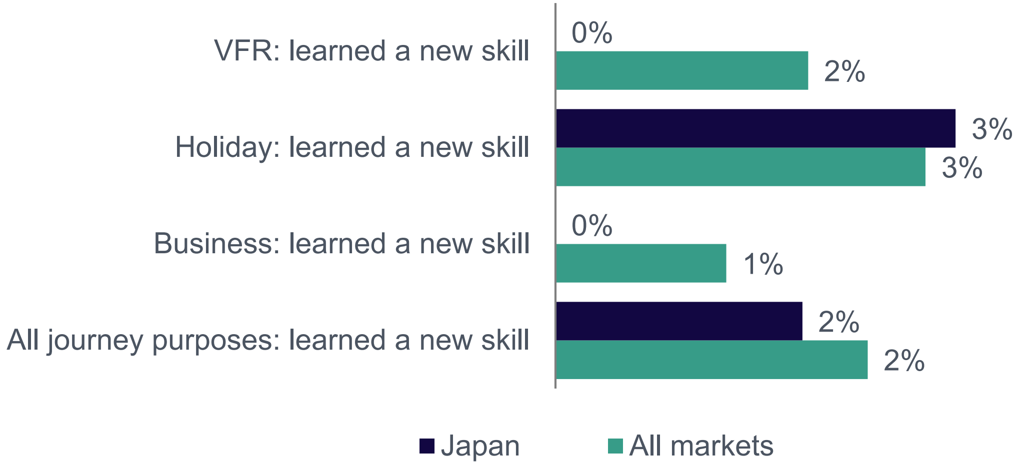
Source: International Passenger Survey by ONS, 2017 (shopping) and 2013 (purchase of selected items) – please note that the data about purchased items is to be updated shortly given the revision of the 2009-2018 IPS data in May 2020

2.1 Inbound activities: learning

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



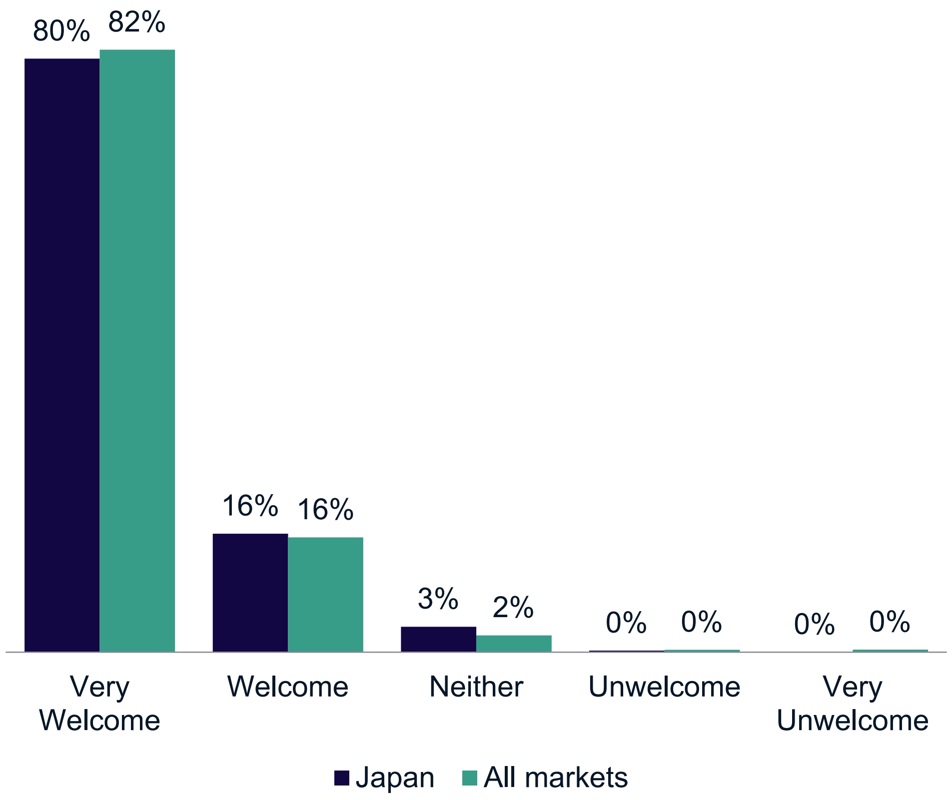
Propensity to learn a new skill or craft



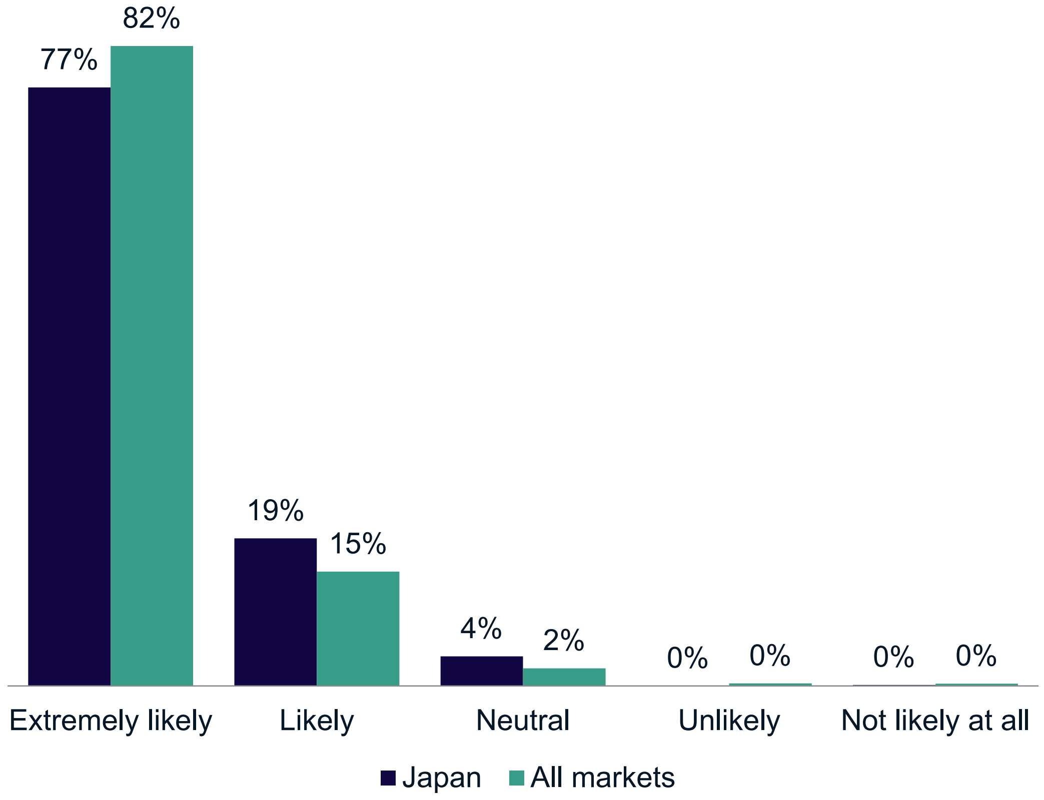
Source: International Passenger Survey by ONS, Did you go on any English language courses during this visit? Displayed as % of all visits in this market, visits incl. participation in an English language course might be based on a small sample.

2.2 Welcome and recommending Britain

Feeling of 'welcome' in Britain



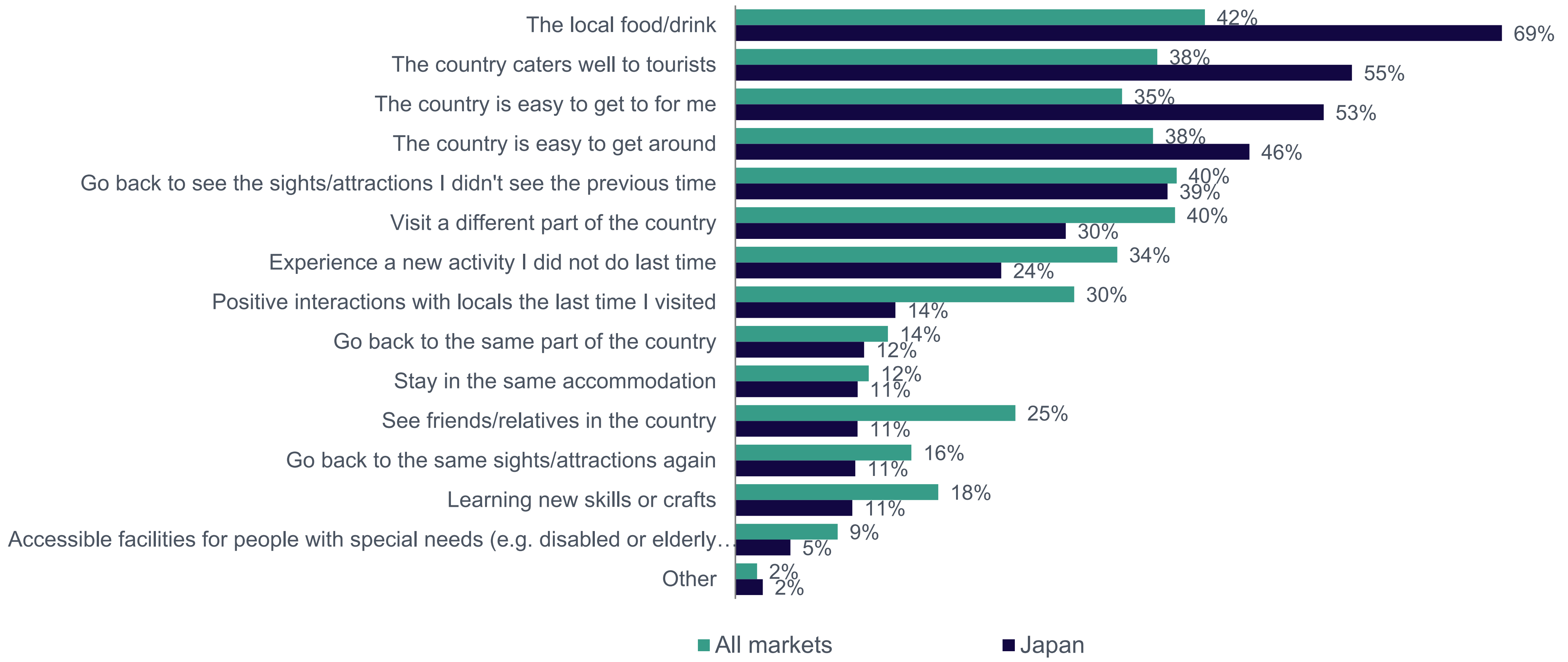
Likelihood to recommend Britain



Source: International Passenger Survey by ONS, 2017

2.2 Reasons to return to a holiday destination

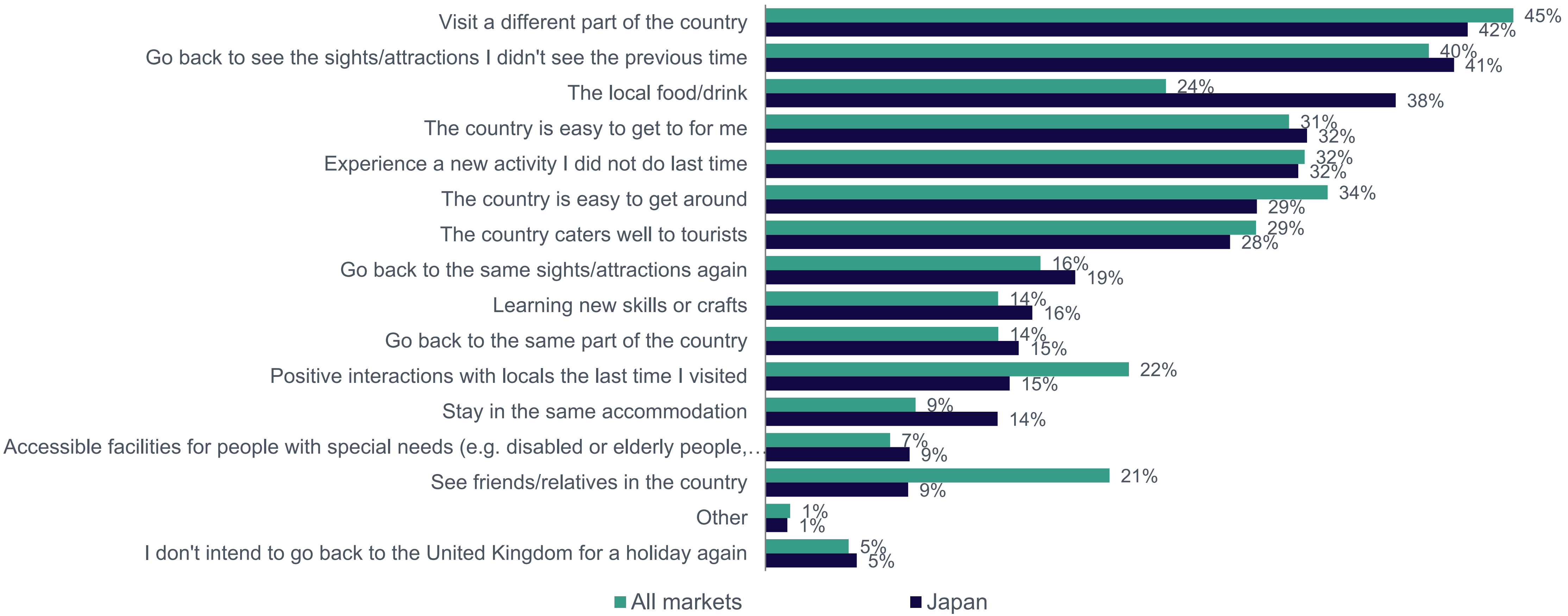
Reasons to return to a destination in general



Source: Anholt Nation Brands Index, powered by Ipsos 2019

2.2 Reasons to return to the UK

Reasons to return to the UK



Source: Anholt Nation Brands Index, powered by Ipsos 2019

2.3 Perceptions of the UK (1)

- In 2021, the Japanese ranked the UK 4th overall out of 60 nations for its 'country brand', a decline of 1 rank compared to perceptions in 2020. They also ranked the UK 3rd for Culture (an increase of 2 ranks), 7th for Tourism (a decline of 2), and 9th for People (also a decline of 2).
- When asked the most important reasons for choosing Britain as a holiday destination, cultural attractions are the main reason why the Japanese chose the UK by far (over half chose this as a key motivation). The fact that English is spoken, as well as the possibility to discover a new destination when visiting the UK, also appealed to many holidaymakers.
- Japanese travellers tend to look for a holiday destination that will provide fun and laughter, where they can enjoy the beauty of the landscape, chill and slow down to a different pace of life. However, they would usually consider the USA as the best to deliver on their top holiday 'wants', and Australia as the best to deliver on the latter two. Britain rates highly for visiting a place with a lot of history and historic sites, seeing world-famous sites and places, broadening their mind, stimulating their thinking, and feeling special or spoilt. However, France is often better perceived for those attributes than the UK.

Biggest draws to the UK for Japanese holiday visitors:
British cultural attractions & somewhere English is spoken

Source: VisitBritain/IPSOS 2016, Anholt Nation Brands Index 2021 powered by Ipsos, Arkenford 2013

2.3 Perceptions of the UK (2)

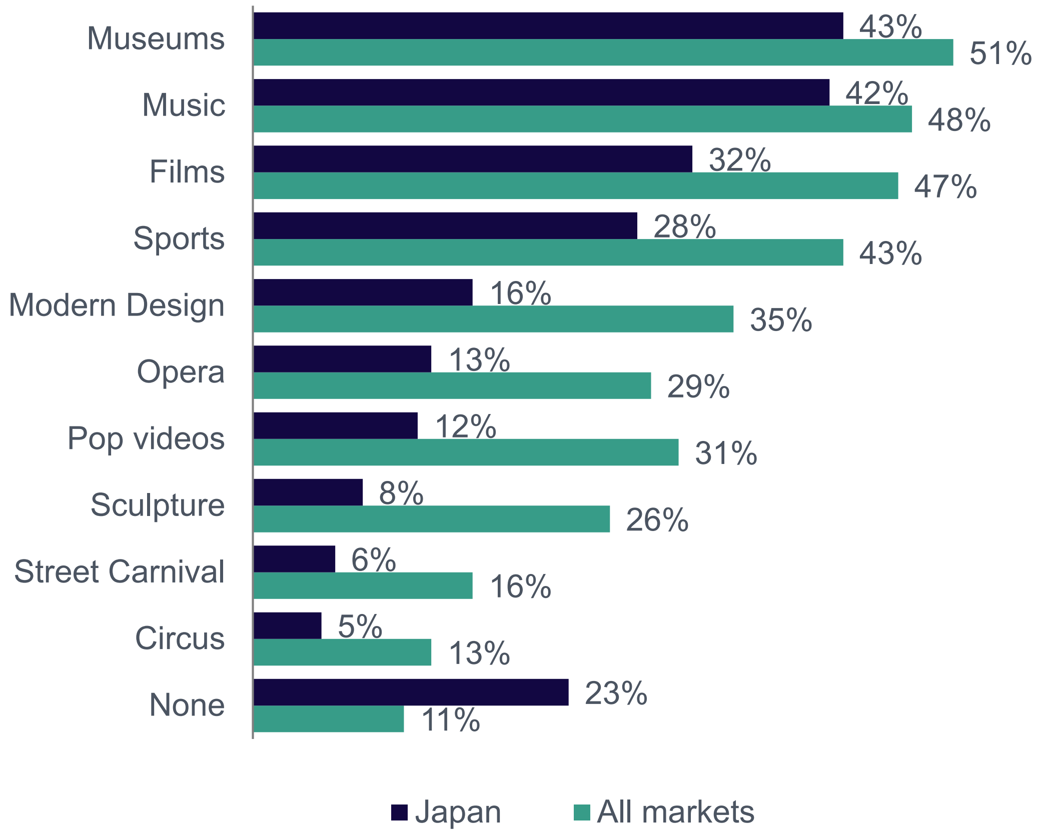
UK's ranking (out of 60 nations)

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

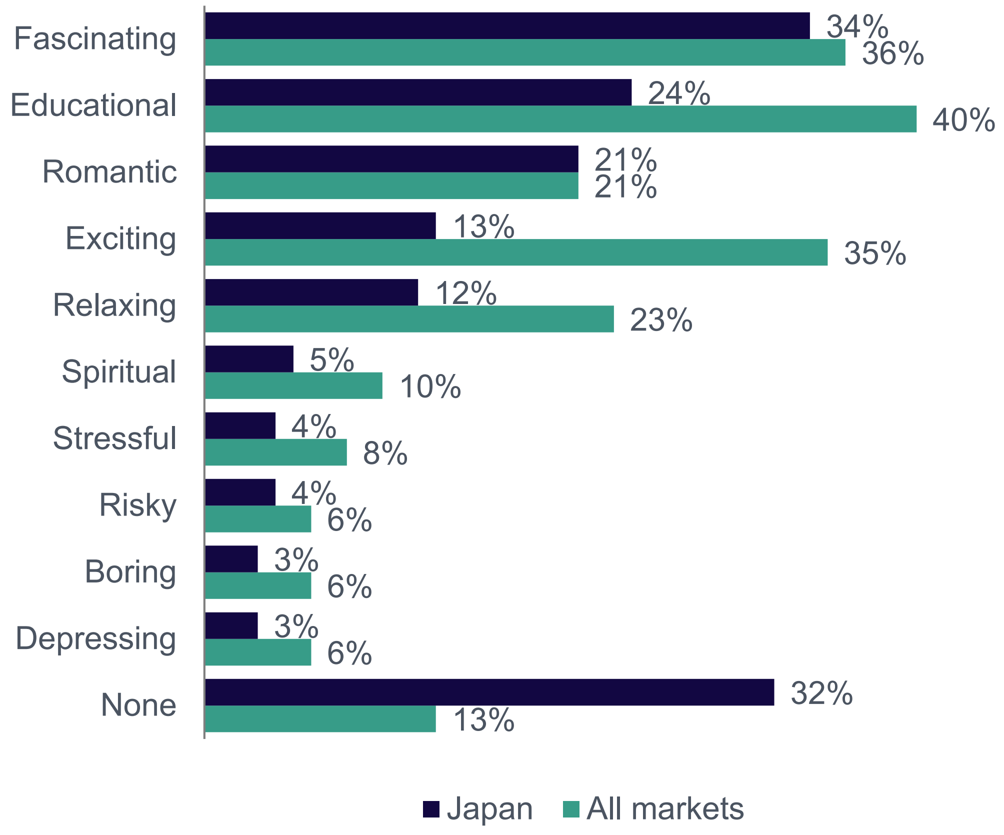
Source: Anholt Nation Brands Index, powered by Ipsos 2021

2.3 Perceptions of the UK (3)

Cultural associations



Adjectives describing a potential trip to the UK



Source: Anholt Nation Brands Index, powered by Ipsos 2021

2.3 Perceptions of the UK (4)

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

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

Source: VisitBritain/Arkenford 2013

2.3 Perceptions of the UK (5)

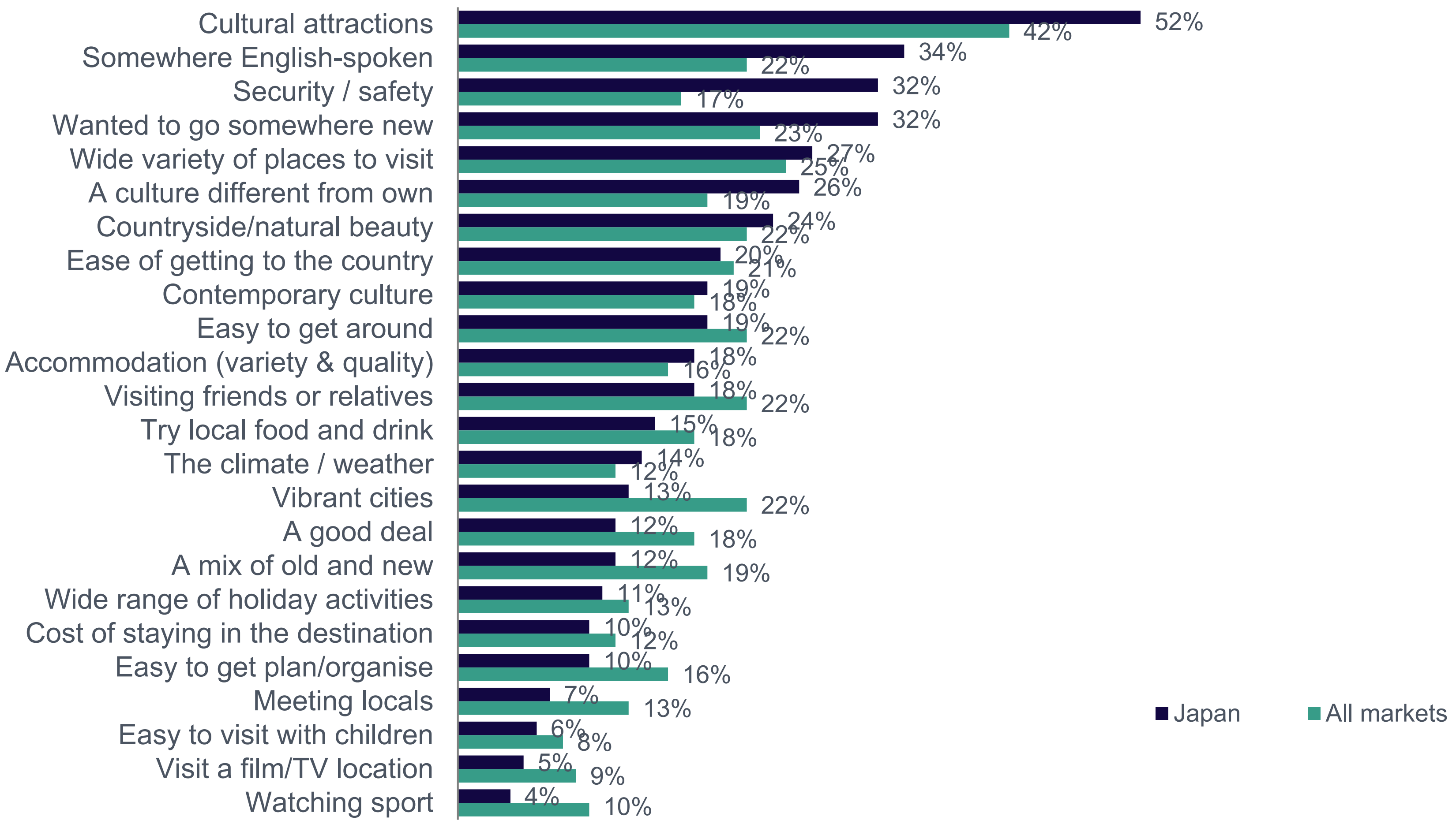
Holiday wants and % saying destination is best place for… bottom 20

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

Source: VisitBritain/Arkenford 2013

2.3 Perceptions of the UK (6)

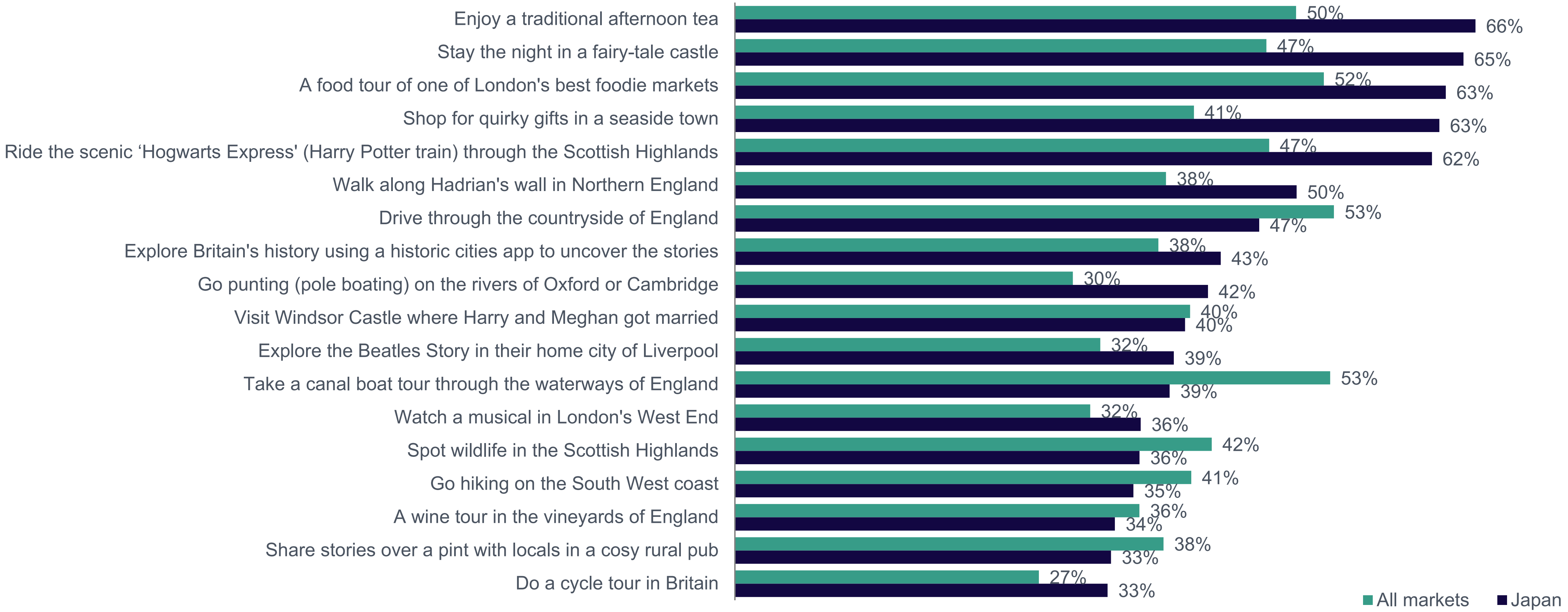
Motivations for choosing Britain as a holiday destination



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

2.3 Perceptions of the UK (7)

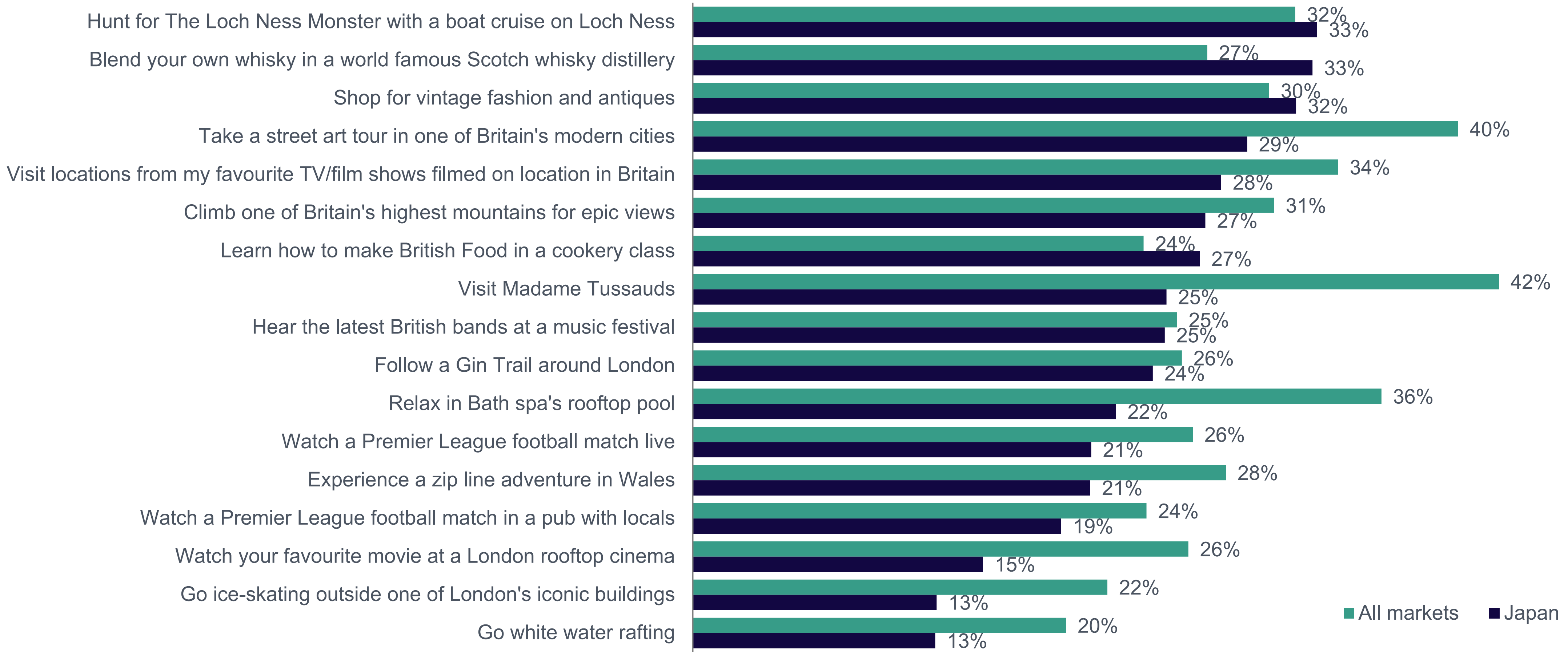
Sought-after Britain activities – top 18



Source: Anholt Nation Brands Index, powered by Ipsos 2020

2.3 Perceptions of the UK (8)

Sought-after Britain activities – bottom 17



Source: Anholt Nation Brands Index, powered by Ipsos 2020

Understanding the market

Chapter 3

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3.1 Structural drivers

- Japan is a parliamentary constitutional monarchy, composed of 4 main islands – Hokkaido, Honshu, Shikoku, and Kyushu – and over 6,800 smaller islands and islets. The country is divided into 47 prefectures.
- The Japanese mainly reside near the coast, with about a third of them concentrated in and around the capital, Tokyo, on the central Kanto plain on Honshu. Over half of the Japanese population live in the major urban areas: Tokyo (37.3m), Osaka (19.1m), Nagoya (9.6m), Kitakyushu-Fukuoka (5.5m), Shizuoka-Hamamatsu (2.9m), and Sapporo (2.7m).
- Japan has an ageing population, and is one of the oldest populations in the world (life expectancy is 85 years old) and one of the lowest birth and fertility rates in world (respectively 7.5 births for 1,000 population, and 1.37 children born per woman, according to 2020 estimates). As a consequence the Japanese population is expected to fall in the coming years, though the population of seniors will rise.
- Full-time workers are entitled to between 10 and 20 days of paid annual leave a year, depending on seniority. In addition to those, there are 16 national public holidays. Since 2000 the Happy Monday system has moved some national holidays to Monday to obtain a long weekend.

92%

of the Japanese population live in urban areas

Source: CIA World Factbook, Japan Payroll, Office Holidays, UN Population Prospects

3.1 Structural drivers: general market overview

General Market Conditions

- Japan has a highly developed free market economy, and is the third largest in the world by nominal GDP, and the fourth largest by purchasing power parity.
- A key feature of Japan's economy is their world ranking automobile manufacturing industry, alongside being often ranked among the world's most innovative countries when it comes to patent filings.
- While Japan has one of the lowest economic growth rates in the world, this is largely due to the shrinking population; its GDP per capita growth is similar to other advanced markets.
- A period of economic stagnation from 1991 has been called the 'lost 20 years', with further struggles due to the Global Financial Crisis, and then the COVID-19 pandemic.
- The economy deteriorated rapidly in 2020 due to the coronavirus pandemic, which depressed household and business spending and led to a collapse in foreign demand. Activity has been rebounding since H2 2020, but the economy saw a temporary setback in the recovery due to a resurgence of COVID infections at home and abroad at the beginning of 2021.
- Oxford Economics believes that continuing vaccination progress will allow consumption to retain momentum in Q4 2021.

Key demographic and economic data

Measure (2021)	Japan
Population (m)	126.0
GDP per capita PPP (US$)	41,271
Annual average GDP growth over past decade (%)	0.5
Annual average GDP growth in 2021 (%)	1.8

Economic indicators (%)

Indicator	2019	2020	2021	2022
Real GDP growth	0.0	-4.7	1.8	3.3
Real consumer spending growth	-0.2	-5.9	1.2	3.0
Unemployment rate	2.4	2.8	2.8	2.6

Source: Oxford Economics, Deloitte, Japan Times

3.1 Structural drivers: demographic and social indicators

Population dynamics

Measure	2021
Population growth rate in 2021	-0.3%
Population aged 65+	29%
Median age	48.6
Urban population	92%

Indicator	1980	2015	2030	2040
Median age (in years)	32.5	46.4	52.1	54.1

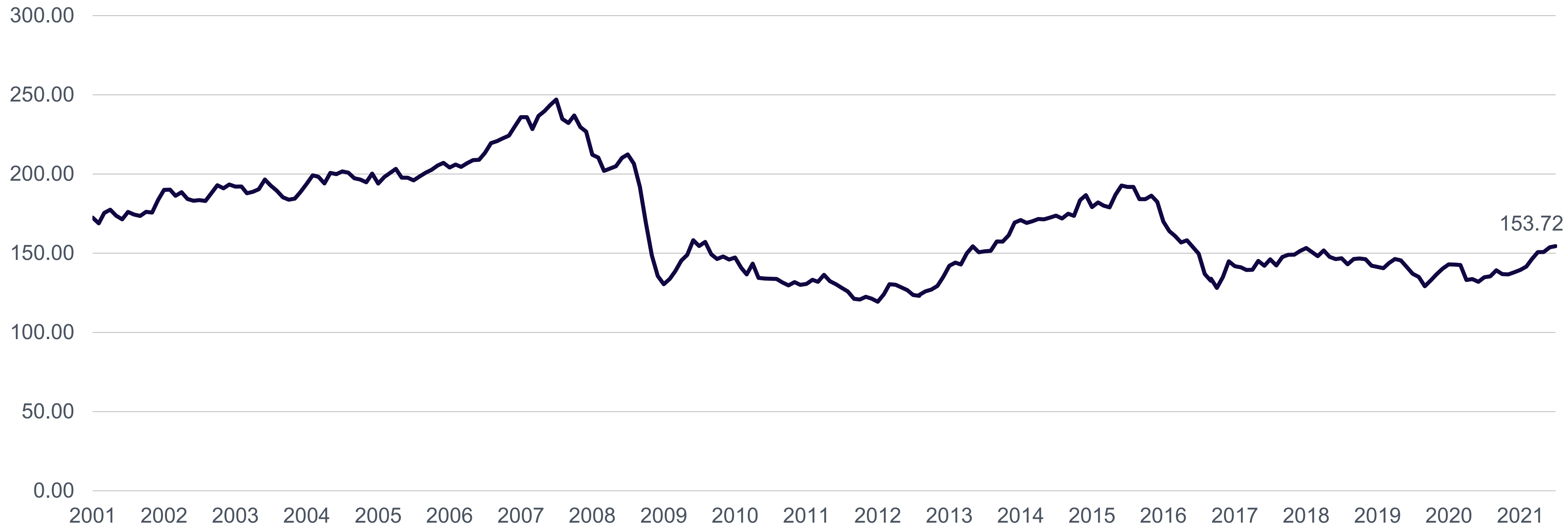
- Japan is the second oldest country in the world after Monaco when ranking the population's median ages. In addition to that, total fertility in Japan has also been falling in the last few decades.
- As a consequence, the population in Japan is forecast to decrease, falling 2% between 2021 and 2025.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

SourceOxford Economics, UN World Population Prospects, CIA World Factbook, Capgemni World Wealth Report

* HNWI stands for High Net Worth Individual, definition in appendix

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 [on our website](#).

Source: Bank of England

3.2 Consumer trends

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

The Japanese passport has been the strongest in the world for

4 years running

Source: Henley Passport Index, Quartz, JTB

3.2 Consumer trends: overall trends pre COVID-19

Workcation

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

Individual travel

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

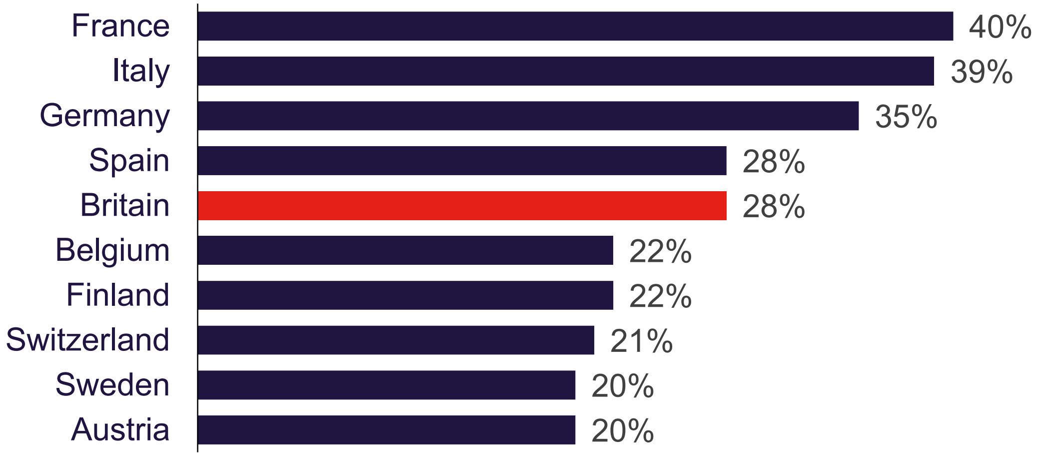
Overseas travel and audiences

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

Source: JTB Report 2020

3.2 Consumer trends: impact of COVID-19

Top European destinations for an international leisure trip*



Key activators for an international leisure trip

	Japan	All markets
Decrease in coronavirus cases at destination	54%	34%
Receiving a COVID-19 vaccination	48%	43%
Removal of quarantine policies in home country	36%	28%
Removal of quarantine policies in destination countries	35%	32%
Stable political environment in destination country	28%	19%

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

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

3.3 Booking and planning

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

Over half

Of Japanese holiday visitors booked their travel to Britain and accommodation there together as a package

Source: VisitBritain/IPSOS 2016

3.3 Booking and planning: booking channels and ticket sales (1)

How trips to Britain were booked

Booking method	Japan	All markets
Online	84%	85%
Face-to-face	8%	10%
By phone	6%	4%
Don't know	2%	1%

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

How trips to Britain were booked: accommodation only

Booking method	Japan	All markets
Online	78%	70%
Face-to-face	7%	7%
By phone	3%	3%
Did not book/stayed with friends/relatives	11%	17%
Don't know	1%	2%

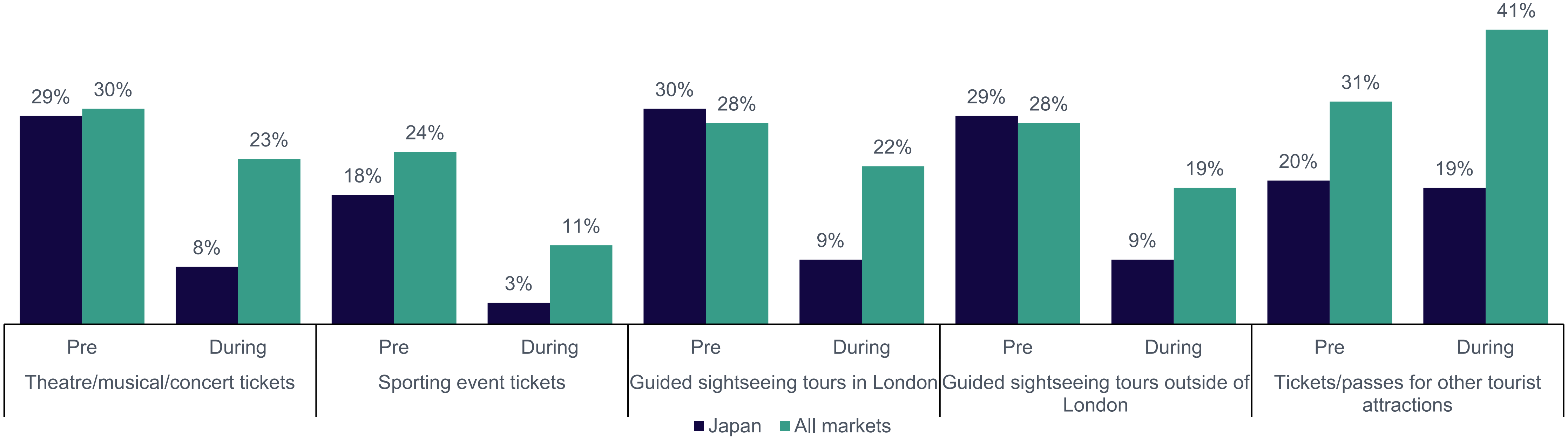
How trips to Britain were booked: travel + accommodation

Booking method	Japan	All markets
Online	58%	64%
Face-to-face	32%	27%
By Phone	10%	8%
Don't know	0%	1%

Source: VisitBritain/IPSOS 2016, base: visitors (online survey)

3.3 Booking and planning: booking channels and ticket sales (2)

Propensity to make a purchase before or during trip



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

Source: VisitBritain/IPSOS 2016, base: visitors (online survey)

3.3 Booking and planning: lead-times (1)

Decision lead-time for visiting Britain

Starting to think about trip

Lead time	Japan	All markets
6+ months	48%	49%
3-6 months	36%	31%
1-2 months	11%	13%
Less than 1 month	1%	5%
Don't know	4%	3%

Deciding on the destination

Lead time	Japan	All markets
6+ months	30%	32%
3-6 months	45%	38%
1-2 months	19%	19%
Less than 1 month	1%	7%
Don't know	5%	3%

Looking at options/prices

Lead time	Japan	All markets
6+ months	19%	21%
3-6 months	44%	37%
1-2 months	31%	27%
Less than 1 month	3%	12%
Don't know	3%	4%

Booking the trip

Lead time	Japan	All markets
6+ months	11%	14%
3-6 months	37%	32%
1-2 months	37%	28%
Less than 1 month	12%	21%
Don't know	3%	5%

Source: VisitBritain/IPSOS 2016, base: visitors

3.3 Booking and planning: lead-times (2)

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

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

Source: VisitBritain/IPSOS 2016, base: visitors

3.4 Reaching the consumer

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

Biggest sources of new brand discovery for Japanese consumers:

Search engines, ads on television, TV shows and films

Source: Hootsuite Digital

3.4 Reaching the consumer: print media landscape

Newspapers

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

Magazines

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

Newspapers	Other information
Asahi Shimbun	Daily, English-language pages
Yomiuri Shimbun	Daily, English-language pages
Mainichi Daily News	English-language pages
Dankei Shimbun	Daily
Nikkei Asian Review	English-language pages
The Japan Times	English-language
Kyodo	English-language pages
Japan Today	Online news, in English

BBC Japan media profile, Santander Trade Portal's 'Japan: Reaching the consumer' profile

3.4 Reaching the consumer: broadcast media landscape

TV

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

Radio

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

TV channels	Radio stations	Top OTT platforms
NHK	NHK – Radio 1, Radio 2, FM Radio, Radio Japan	Amazon Prime Video
TV Asahi	Inter FM	Niconico
Fuji TV	J-Wave	Tver
Nippon TV (NTV)	Tokyo FM	ABEMA
Tokyo Broadcasting System (TBS)	TBS Radio	GYAO!

BBC Japan media profile, Santander Trade Portal's 'Japan: Reaching the consumer' profile, Statistics Japan on Leisure Activities and Time Use, Tamko, SpotX, Nippon.com

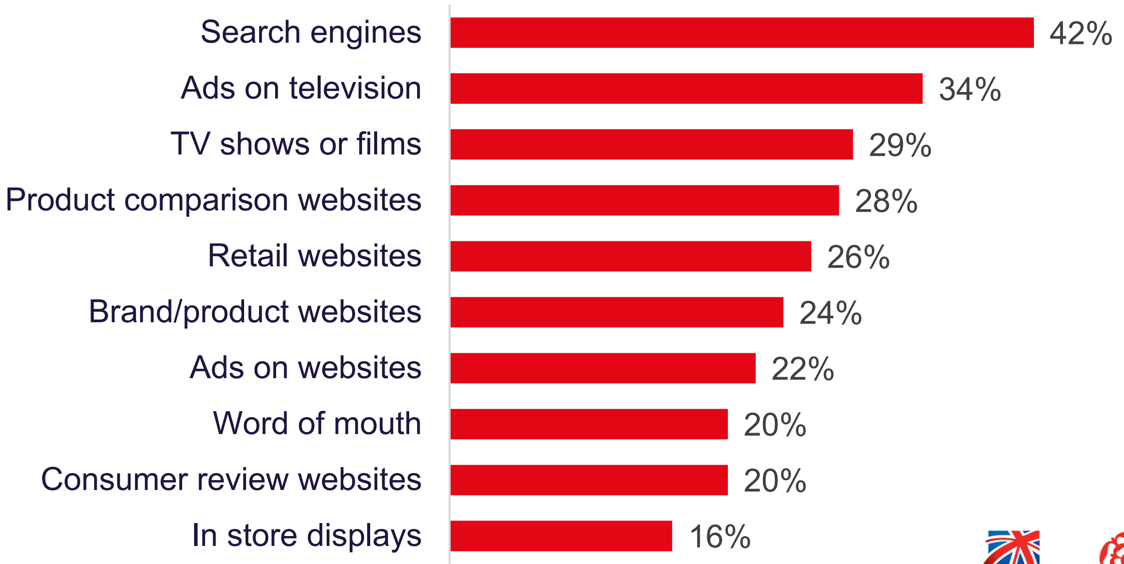
3.4 Reaching the consumer: internet and social media

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

Social media rankings	Mobile app rankings
YouTube	LINE
LINE	Twitter
Twitter	Instagram
Instagram	Yahoo Japan
Facebook	Amazon
Facebook Messenger	Facebook
Skype	Yahoo Japan Weather
TikTok	Rakuten Chiba
Pinterest	PayPay
Snow	Mercari

Source: Hootsuite Digital, Statista

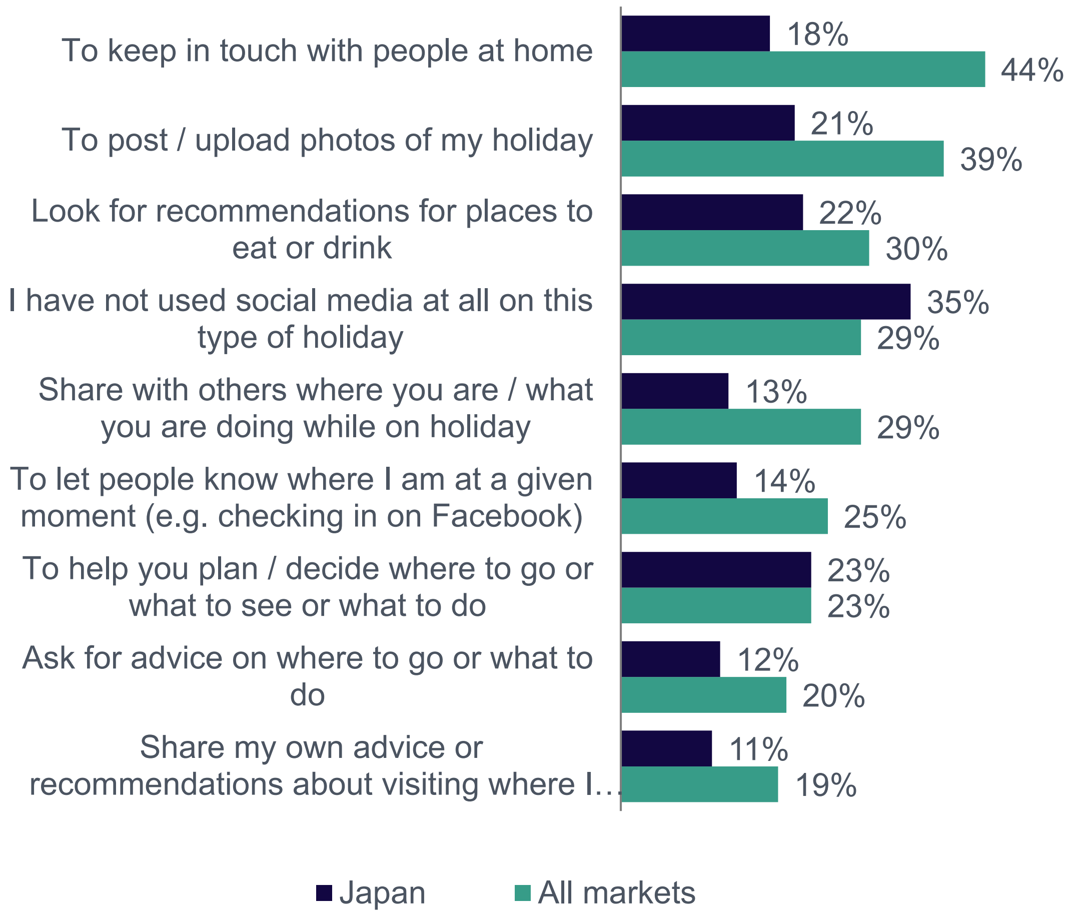
Sources of new brand discovery



VisitBritain VisitEngland

3.4 Reaching the consumer: social media on holiday

Use of social media on holiday

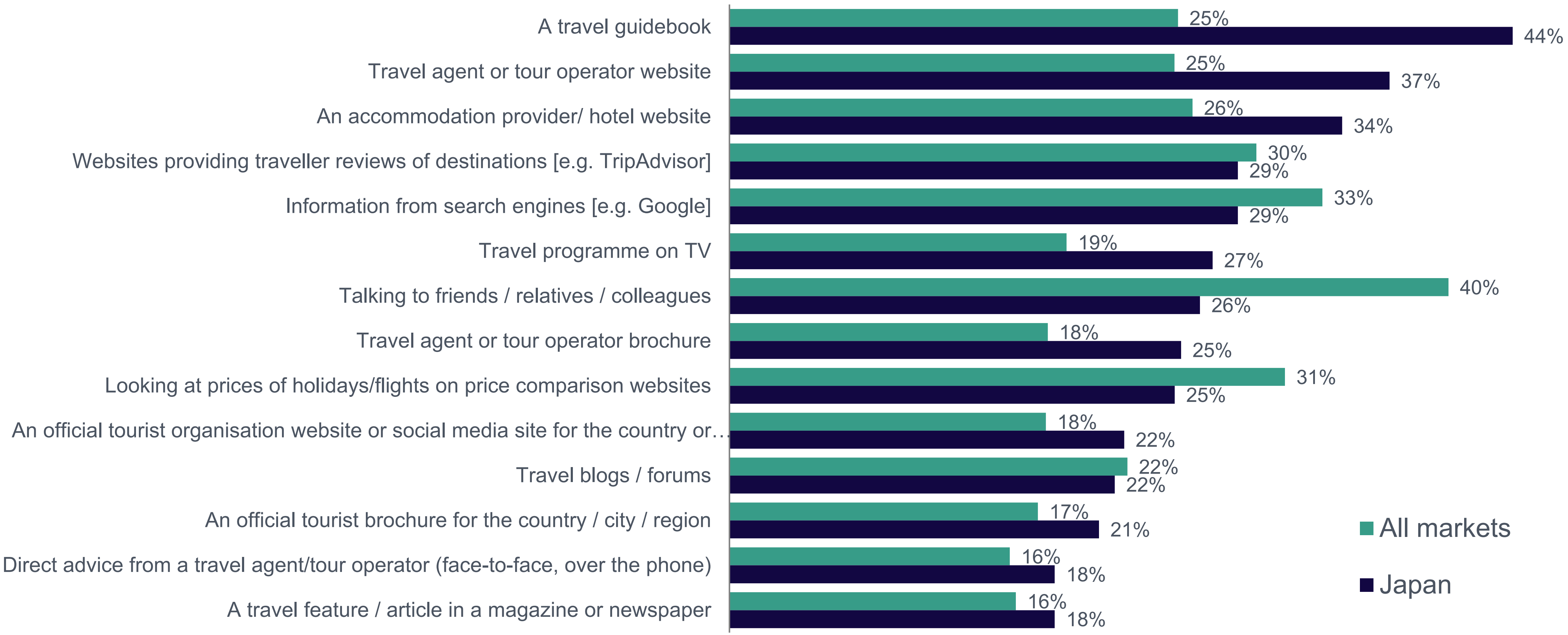


- Japanese international travellers are usually less likely to use social media at all whilst on holiday in a foreign destination than the all-market average.
- They would be as likely as the all-market average to use them as a way to plan or decide where to go, what to see, or what to do. Other popular 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 smarphone essential when going on holiday, but proportionaly more of them would consider their tablet an essential item when they go on holiday (67% vs 56% across all markets).

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

3.4 Reaching the consumer: influences (top 14)

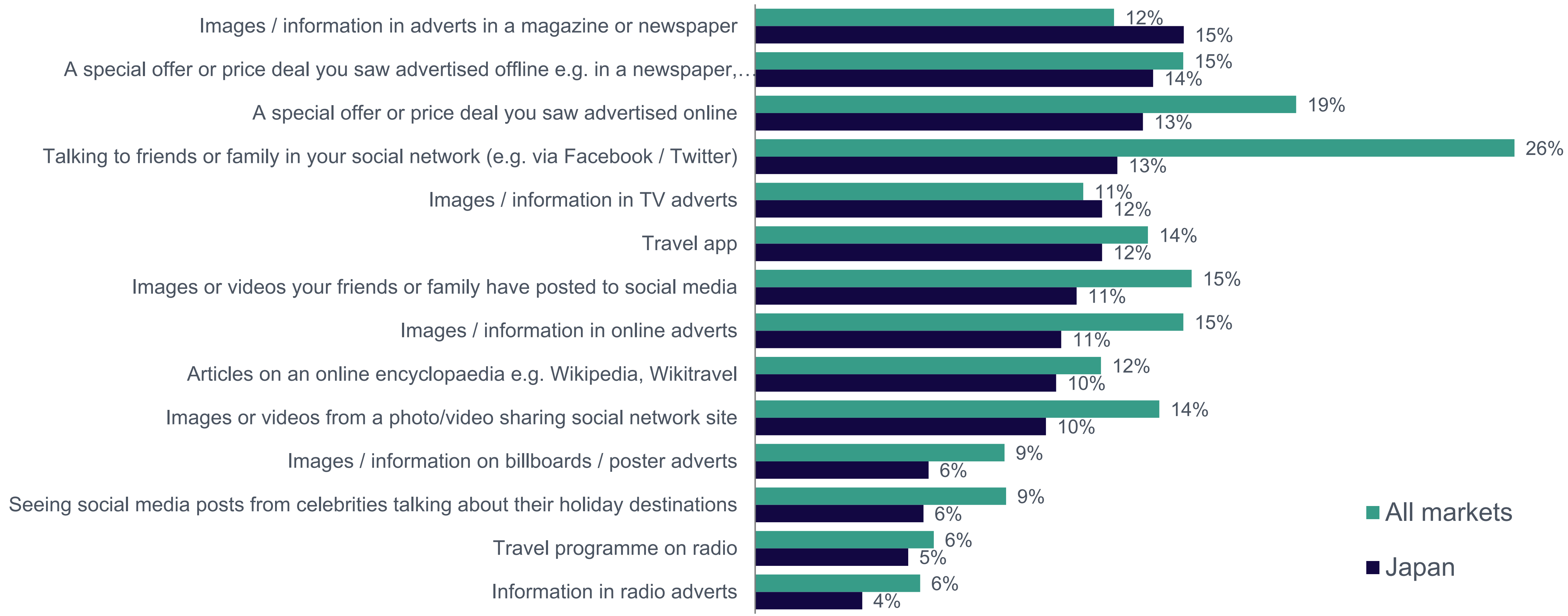
Influences on destination choice – top 14



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

3.4 Reaching the consumer: influences (bottom 14)

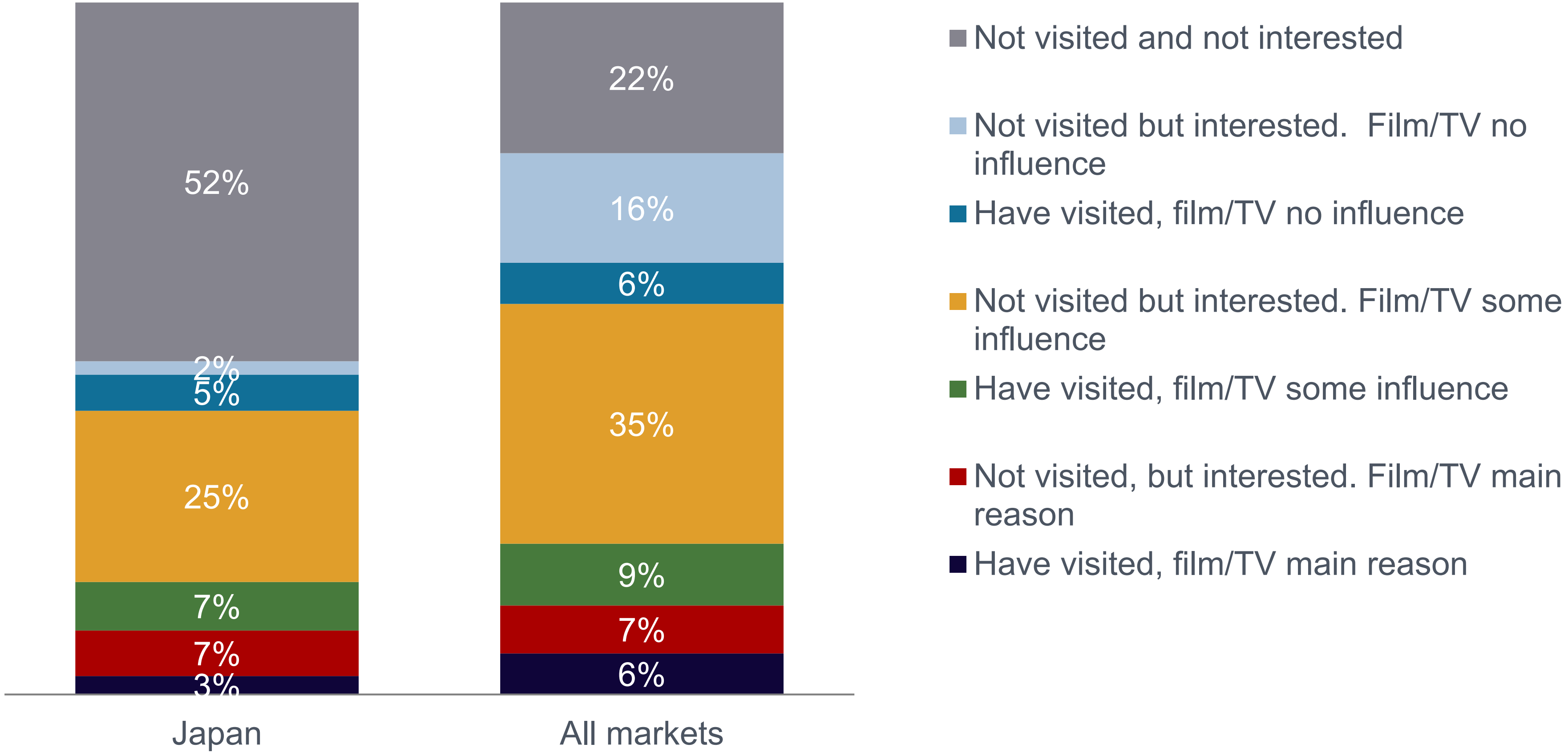
Influences on destination choice – bottom 14



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

3.4 Reaching the consumer: influences

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



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

Access and travel trade

Chapter 4

Getty Images/ Gordon Edgar Images

4.1 Access: key facts

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

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

87%

of Japanese visitors travel to the UK by plane

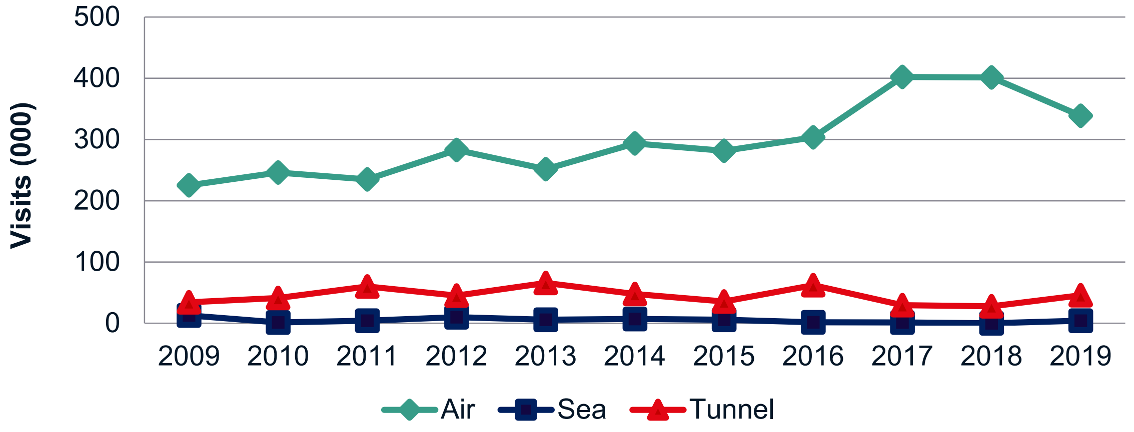
Access to Britain

Measure	2019
Weekly aircraft departures	38
Weekly seat capacity	8,543
Airports with direct routes in Japan	3
Airports with direct routes in Britain	1

Source: Apex, non-stop flights only

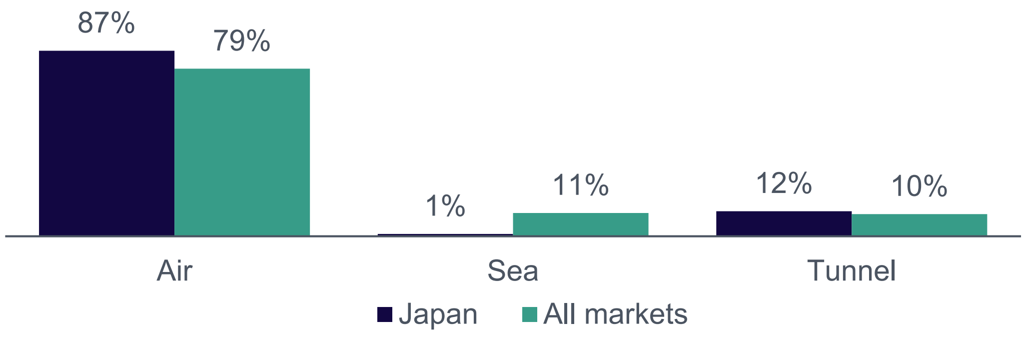
4.1 Access: mode of transport

Visits by mode of transport



Sea and tunnel travel (000s) in 2019

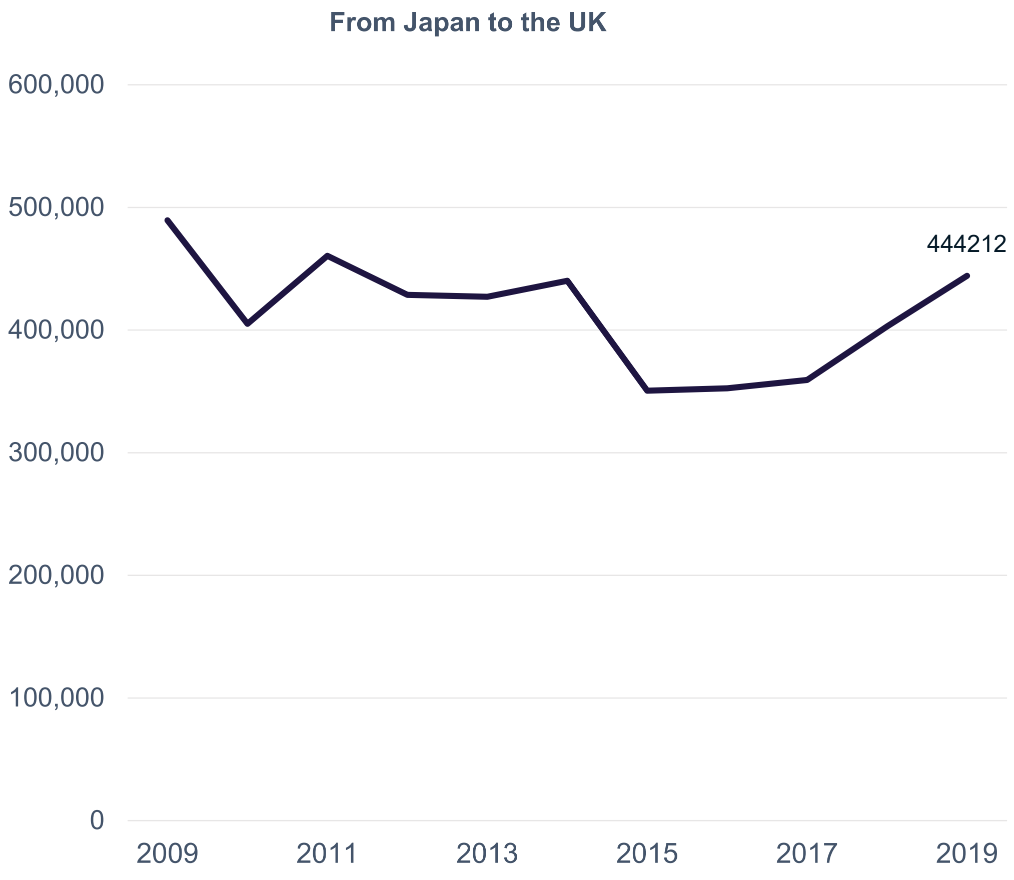
Annual share by mode (2019)



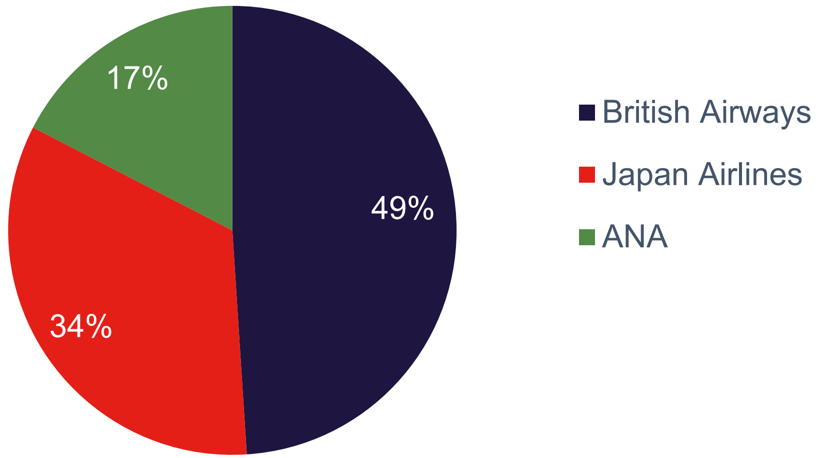
Source: International Passenger Survey by ONS

4.1 Access: capacity

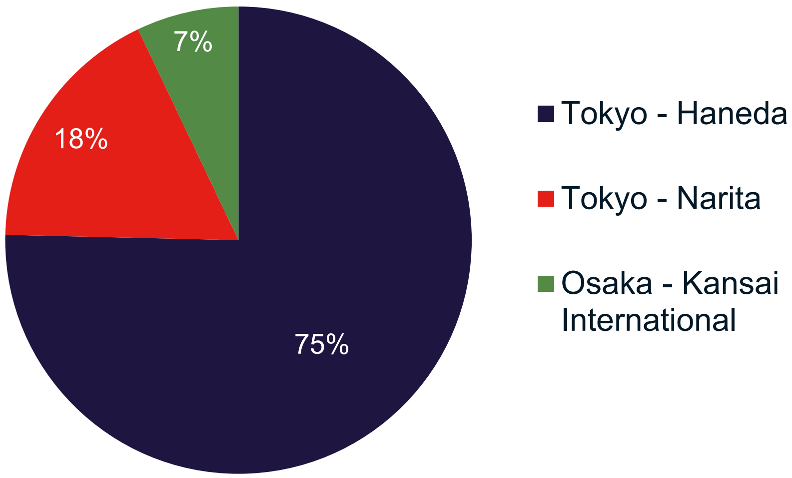
Annual airline seat capacity trends



Airline seat capacity by carrier (2019)



Origin airport annual seat capacity (2019)



Source: Apex 2019, non-stop flights only

4.2 Travel trade: general overview

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

The Japanese travel trade is a highly regulated market

Source: JTB Report 2018

4.2 Travel trade structure

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

Rank	Top 5 wholesalers for the UK
1	JTB World Vacations
2	Nippon Travel Agency
3	Kinki Nippon Tourist
4	JALPAK
5	ANA Sales

Major operators

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

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

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

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

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

Source: MLIT website, VisitBritain/IPSOS 2016 (base: visitors), JTB Tourism Research & Consulting Co, JATA, JNTO

4.2 Travel trade structure

Wholesalers and large travel agencies

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

Main tour operators and travel agencies

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

Trends and challenges

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

Source: Business Insiders, VisitBritain/IPSOS 2016

4.2 Travel trade: doing business

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

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

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

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

Tips for doing business:

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

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

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

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

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

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

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

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

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

Source: Japan Guide, Numbero, T-Expo Japan

4.2 Travel trade: meetings

Greeting

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

Name Cards/Business Cards

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

Meetings & business etiquette

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

Hospitality Etiquette

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

4.2 Travel trade: Japanese holidays

National public holidays

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

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

Source: Officeholidays.com

4.2 Caring for the consumer: understanding culture and etiquette

Uchi-soto - Us and them

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

Honne and Tatemae

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

Expectations

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

Interaction

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

4.2 Caring for the consumer: understanding culture and etiquette

Do’s and Don’ts

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

Safety

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

Service-related tips and useful information

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

4.2 Caring for the consumer: hospitality

Accommodation

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

Food and drink

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

Source: VB/DEFRA’s “Food is GREAT”

4.2 Caring for the consumer

Language

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

Source: CAA Passenger Study 2015

Useful links and further information

Appendix

Appendix 1: Working with VisitBritain (1)

We can help you extend your reach through:

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

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

Opportunity search or trade website

or contact the B2B events team
(Email: events@visitbritain.org)

or campaign partnerships team
(Email: partnerships@visitbritain.org)

or trade support team
(Email: tradesupport@visitbritain.org)

or VisitBritain shop team
(Email: product@visitbritain.org)

Appendix 1: Working with VisitBritain (2)

VisitBritain's strategy to grow tourism to 2025

- **Developing world-class English tourism product:** VisitBritain has collaborated with VisitEngland to develop and deliver the **Discover England Fund** since April 2016
- **Collaborating globally:** VisitBritain's network extends in four regions: Europe, the Americas, APMEA and North East Asia. Meet those teams and their trade partners at VisitBritain's different trade events, VIBE, ExploreGB, or Destination Britain events in market.
- **Inspiring the world to explore Britain** as a **GREAT Britain** campaign partner and through our **'I Travel For…'** marketing campaign.
- **Acting as trusted partner and advisor** to the industry, but also our Government and Public Diplomacy partners by generating and offering them world-class market insights.

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

To find out more information, browse:

VisitBritain's mission

The Government's Tourism Action Plan

VisitBritain's events

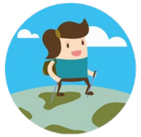
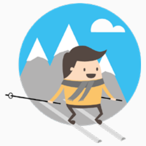
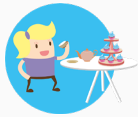
Business Recovery Webinars

Appendix 1: Working with VisitBritain (3)

VisitBritain's global audience segments

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

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

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

Source: VisitBritain/Kubi Kalloo, 2017

Appendix 2: Useful research resources (1)

We have dedicated research and insights available which include:

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

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

To find out more about Japan or other inbound markets browse our:

Markets & segments

Inbound research & insights

Inbound COVID-19 sentiment tracker

Or contact us directly
(Email: research@visitbritain.org)

Appendix 2: Useful research resources (2)

We have dedicated research and insights available which include:

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

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

To find out more about Japan or other inbound markets browse our:

Markets & segments

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Or contact us directly
(Email: research@visitbritain.org)

VisitBritain VisitEngland

Appendix 3: Definitions, sources and information on this report (1)

Details on main sources:

- The **International Passenger Survey** (IPS) is a UK-wide departure survey, carried out by the Office for National Statistics (ONS). All data are based on data collected as visitors are about to leave the UK about what they did, not on their intentions or perceptions. Except when specified, IPS refers to people according to their country of residence, not nationality. Where we talk about mode of transport, it refers to what is used on departure to leave the UK, with the presumption that shares are similar on arrival. To find out more and consult the release calendar, browse our IPS page.
- **Oxford Economics** tourism forecasts are from the October 2021 update of the 'Global Travel Service' databank.
- **Apex** data was last updated with January 2022 data.
- **UNWTO** data are based on their latest Tourism Barometer and Statistical Annex, September 2021.
- **VisitBritain/IPSOS 2016** refers to the 'Decisions & Influences' research project carried out in Australia, Brazil, Canada, China, Denmark, France, GCC (UAE and Saudi Arabia), Germany, India, Italy, Japan, Netherlands, New Zealand, Norway, Russia, South Korea, Spain, Sweden, and USA. Its all-market averages are based on weighted average of those markets. Only international travellers participated, half of each market sample having travelled to Britain before.
- The **Anholt Nation Brands Index** (NBI), now powered by Ipsos, was carried out online in July-August 2021 in Argentina, Australia, Brazil, Canada, China, Egypt, France, Germany, India, Italy, Japan, Mexico, Poland, Russia, South Africa, South Korea, Sweden, Turkey, UK and USA. Its all-market averages are based on those markets. It is based on nation-wide representative samples. More detail in our 'How the world views the UK' foresight.

Appendix 3: Definitions, sources and information on this report (2)

Useful definitions and abbreviations

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

Other useful information

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

Market and Trade Profile: Japan

January 2022

Destination Bristol ©Gary Newman