

# Japan Tourism Report 2011

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## Abstracts

Japan's arrival numbers have grown steadily since 2001. Although they took a hit in 2009, falling to less than 6.66mn after reaching 8.35mn in 2008, arrivals are estimated to have rebounded in 2010 to 8.45mn and are expected to climb to 8.99mn in 2011.

The number of air and sea tourist arrivals continually increased from 2001 to 2007. Tourist arrivals by air were by far the most predominant, with 8.49mn arriving by air in 2007 compared to 666,000 by sea. Leisure arrivals outnumber those visiting Japan for business purposes. In 2009, leisure arrivals totalled 4.65mn, while business arrivals came to 1.24mn, both falling from 2008 but picking up in 2010 to 6.10mn and 1.54mn respectively. BMI forecasts that the number of leisure arrivals will continue to grow for the remainder of the forecast period, reaching 8.44mn by 2014, while business arrivals are forecast to reach 1.74mn.

Japan is targeting Chinese tourists and has eased visa regulations for Chinese citizens. Until 2009, visas were only granted to individual Chinese travellers with an annual income of at least CNY250,000 (US\$36,600). Given that this is large sum for most Chinese workers, visitors tended to travel as part of a tour group. However, Japan has lowered the threshold of annual income to CNY60,000 (US\$8,780). To deal with the rise in visa applications, all seven Japanese diplomatic offices in China will accept applications, instead of just three previously, and has the number of Chinese tour agencies eligible to apply for visas for the customers has increased from 48 to 290. That said, a territorial dispute between the two countries over islands in the South China Sea has flared up after Japan arrested a Chinese boat captain in the East China Sea in September 2010, which will likely put downward pressure on tourism.

As well as appointing Hiroshi Mizohata as the new tourism commissioner in April 2010, the Japanese Tourism Agency (JTA) has a new slogan and logo. The Japan: Endless Discovery slogan is part of the country's revamped tourist promotions to boost inbound

visitor numbers. The latest logo depicts white Japanese cherry blossom against a red sun background.

Individual and collective government expenditure is forecast to decline over the coming years. The Japanese government's individual expenditure has risen since it came in at US\$15.64mn in 2001 but is estimated to peak at US\$24.11mn in 2010. We forecast individual government tourism expenditure to decline to US\$22.26mn by 2014. The government's collective tourism expenditure is also expected to decrease during the forecast period. In 2001, collective expenditure came in at US\$12.30mn and is estimated to have peaked at US\$18.86mn in 2010. From 2011, BMI forecasts collective expenditure to fall, reaching US\$17.34mn by 2014.

There is room for growth in the low-cost carrier segment of the Japanese airline market. Japan's air industry is dominated by Japan Airlines (JAL) and All Nippon Airways (ANA). Budget airlines have not sprung up in Japan as in the rest of the Asia Pacific region due to the country's expensive and inefficient airports. That said, Ibaraki Airport at Omitama, 53 miles (85km) north of Tokyo, opened in March 2010 and is intended to be a no-frills airport, which could allow for low-budget airlines to enter the market. However, Ibaraki has only attracted one daily flight to the South Korean capital Seoul on Asiana Airlines as of October 2010. ANA has been considering launching a low-cost carrier operating international and domestic routes to take advantage of the new runway at Haneda Airport in Tokyo and will launch a low-cost airline based at Kansai International Airport, Osaka, in 2011.

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