

White Paper on Tourism in Japan, 2012

Summary

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Status of Tourism in FY2011

Part I New Developments in Tourism Policy

Chapter 1 Promoting Tourism Policy by the Entire Government

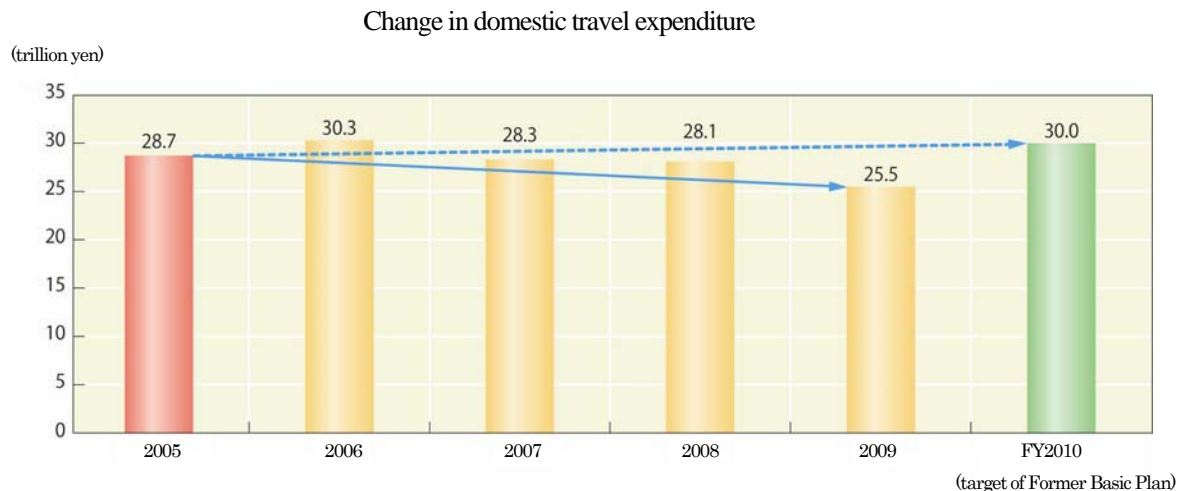
Section 1 Tourism Administration as a Growing Field

The “realization of a tourism nation” is regarded as an essential national issue for developing Japanese economic society in the 21st century as seen in the enactment of “the Tourism Nation Promotion Basic Law” in December 2006 and the cabinet decision on “the Tourism Nation Promotion Basic Plan” (referred to below as the Former Basic Plan) in June 2007. The Japan Tourism Agency (JTA) was founded on October 1, 2008. Furthermore, considering changes in the situation in recent years, a new Tourism Nation Promotion Basic Plan (referred to below as the Basic Plan) was decided by the cabinet on March 30, 2012.

Section 2 Level of Achievement of the Former Basic Plan

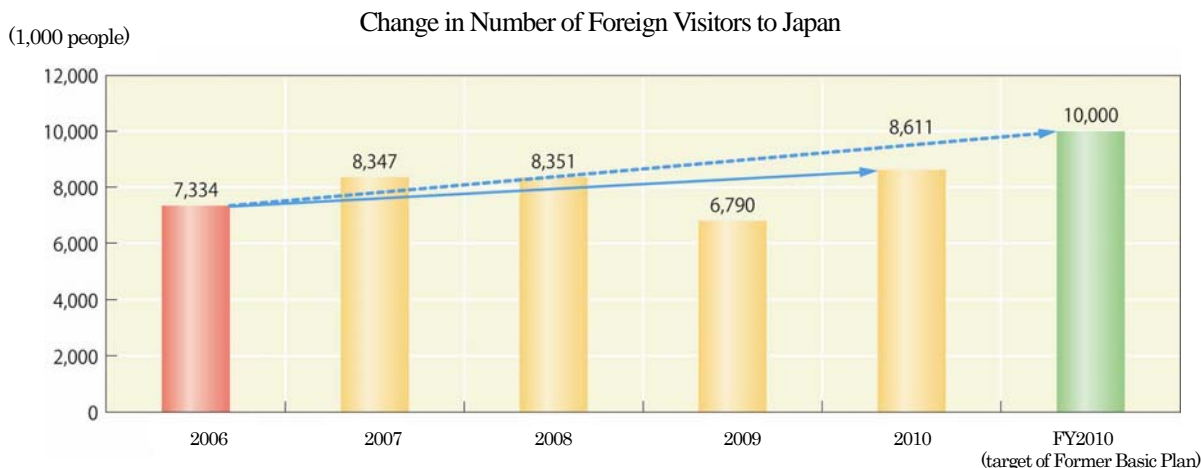
1 Domestic travel expenditure (target: 30 trillion yen by fiscal 2010, result in 2009: 25.5 trillion yen)

Domestic travel expenditure did not increase because leisure activities associated with the retirement of the baby-boom generation did not grow as expected, the paid vacation usage rate showed only a limited rise, and the consumer price index did not increase as expected.



2 Number of foreign visitors to Japan (target: 10 million by 2010, result in 2010: 8.61million)

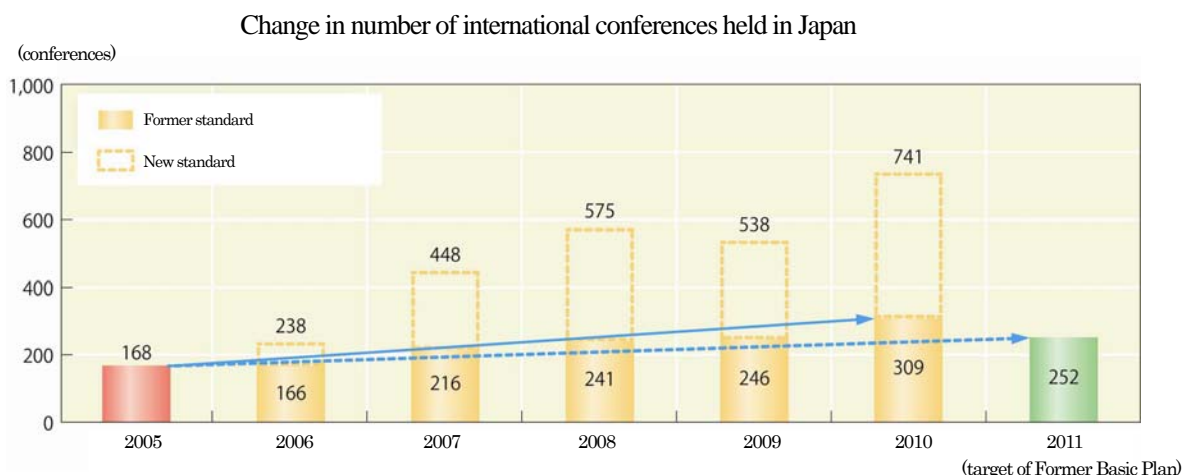
Since 2003 when the Visit Japan Campaign commenced, the number of foreign visitors to Japan has steadily increased, reaching 8.35million in 2007. However, the number sank to 6.79million in 2009 owing to the effects of the global economic downturn precipitated by the collapse of Lehman Brothers in 2008 and the effects of the swine flu epidemic in 2009. The following year, 2010, saw a record high of 8.61million foreign visitors despite the drop in the number of Chinese visitors to Japan as a result of the Chinese fishing boat collision incident near Senkaku Islands.



3 Number of international conferences held in Japan (target: increase of at least 50% by 2011 (252 conferences), result in 2010: 309 conferences)

Since the formulation of the Former Basic Plan, the number of international conferences held in Japan has steadily increased. According to the Former Standard* of the UIA (Union of International Associations), the number rose from 168 (2005) to 309 (2010), reaching the target of an increase of at least 50% (252). According to the new standard* of the UIA, the number of international conferences held in Japan was 741 (2010), giving Japan the top spot in Asia.

The main reasons for the increase included the rise in the number of international conferences held in the Asia region due to its economic growth and the internationalization of national conferences. Particularly in 2010, there were numerous conferences held in relation with the Asia-Pacific Economic Cooperation forum (referred to below as APEC) and the 10th meeting of the Conference of the Parties (COP10) to the Convention on Biological Diversity, boosting the growth figures.

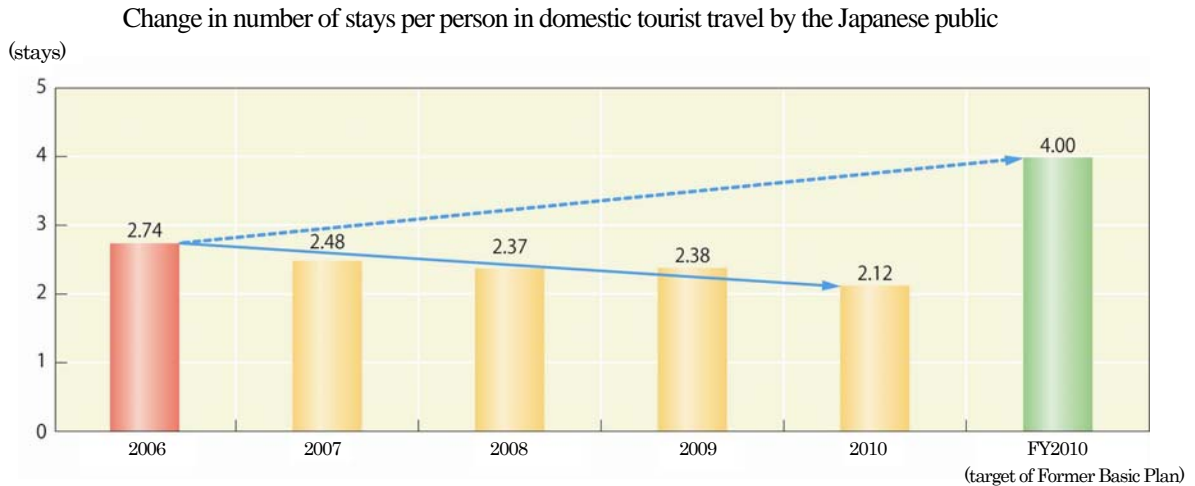


*Old standard and new standard of the UIA

Organizer	Former standard (until 2006)	New standard (from 2007)
International organization	(1) Participants: At least 50 (2) Participating countries: At least 3 (3) Conference period: At least 1 day	(1) Participants: At least 50 (2) Participating countries: At least 3 (3) Conference period: At least 1 day
Domestic organization	(1) Participants: At least 300, with at least 40% of participants not from the host country (2) Participating countries: At least 5 (3) Conference period: At least 3 days	(1) Participants: At least 300 (at least 40% of participants not from the host country), or if the number of participants is unknown and there is a joint exhibition, the number satisfies the requirements on the number of participants (2) Participating countries: At least 5 (3) Conference period: At least 3 days

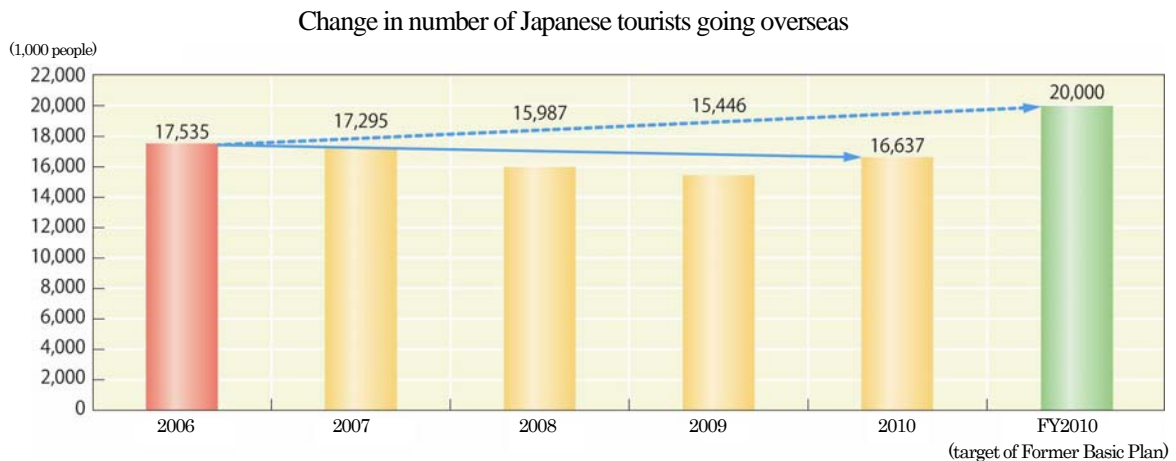
4 Number of stays per person in domestic tourist travel by the Japanese public (target: 4 nights per year by 2010, result in 2010: 2.12 nights)

The number of stays per person in domestic tourist travel by the Japanese public is on a slight downtrend due to the effects of the economic slump triggered by the global financial crisis and the relative decline in the attractiveness of travel resulting from the diversification of hobbies and leisure. Other likely contributing factors are the fact that leisure activities associated with the retirement of the baby-boom generation did not grow as expected and the paid vacation usage rate showed only a limited rise.



5 Number of Japanese tourists going overseas (target: 20 million by 2010, result in 2010: 16.64 million)

After the formulation of the Former Basic Plan, the number of Japanese tourists going overseas was on a downward trend due to the effects of the global financial crisis and the swine flu epidemic, but it recovered in 2010 with a final result of 16.64 million.



Chapter 2 New Tourism Nation Promotion Basic Plan

Section 1 Basic Policy

The aims of the Tourism Nation Promotion Basic Law are “the development of the nation’s economy”, “the promotion of international mutual understanding”, “the stabilization and improvement of citizens’ daily lives”, to which has been added “reconstruction from an earthquake disaster” as a major focus following the Great East Japan Earthquake.

Section 2 Directionality of the Formulation of the Basic Plan

1 Expanding the tourism base

(1) Expanding international tourism

Since the start of the Visit Japan Campaign in 2003, we have been tackling the task of overseas promotion in order to increase the number of foreign visitors to Japan. However, to attract foreign visitors we will be required to devise more strategic promotional activities in the coming years due to more intense international competition and to the fact that we face a slowdown in growth in the number of foreign visitors to Japan caused by outside factors.

MICE (=Meetings, Incentives, Conventions, Exhibitions/Events) including international conferences and exhibitions has wide-ranging economic significance in that it has a considerable economic ripple effect and creates business opportunities. Japan must therefore support activities related to attracting and hosting MICE by local public entities, convention bureaus, and private businesses and support efforts aimed at strengthening competitiveness.

On the other hand, promoting overseas travel is highly advantageous in that it can contribute not only to enhancing Japanese people’s international sensibility but also to the expansion of inbound tourism through the expansion of two-way exchanges with other countries (promotion of two-way tourism). It is therefore necessary to create an environment that encourages Japanese citizens to travel abroad.

(2) Expansion of domestic tourism

The demand of the baby-boom generation for travel is not growing as expected, and the paid vacation usage rate by the working generation is showing only a slight increase. In addition, in recent years, the rate of travel has been on the downward trend, with the so-called “zero travel demographic”, which does not go on a trip even once a year, already currently accounting for more than half the population. In particular, a drop in the number of young travelers who will prop up future travel demand could cause the tourism market to contract in the future. To overcome this situation, it is necessary to promote travel among not only the zero travel demographic and young people but all citizens.

On the other hand, the attractiveness of travel is in relative decline owing to the diversification of hobbies and leisure, so it is important to boost the attractiveness of travel itself. However, there are several issues that must be tackled, such as income and time constraints and the fact that the environment is not sufficiently developed to enable the elderly to travel safely and securely.

3 Improving tourism quality

To strengthen the international competitiveness of Japan’s tourism industry, its potential must be fully utilized

by creating tourist destinations favored by both inbound and outbound tourists. To this end, it is important that a wide spectrum of relevant parties (tourism industry, agriculture, forestry and fisheries industry, trade and manufacture, government, NPOs, etc.) come on board and collaborate to establish a “brand” that represents Japan in the eyes of both inbound and outbound tourists through the continual strategic development of tourist destinations that make full use of tourism resources while clarifying regional concepts and conducting sound marketing. It is also important to encourage several tourist destinations to cooperate effectively in building a uniquely themed tourist route that links them and is suitable for both touring and overnight stays, to further enhance the environment to make it more welcoming to visitors by installing easy-to-follow direction boards, heighten the satisfaction of foreign visitors to Japan, cultivate human resources to engage in the tourism industry, and strengthen the managerial abilities of tourist destinations.

Section 3 Targets of the “Realization of a Tourism Nation” by 2016

The Basic Plan was formulated with two new targets of improving the satisfaction of foreign visitors to Japan and improving the satisfaction of visitors to tourist destinations in addition to the five fundamental targets of the Former Basic Plan in order to lift the quality of tourist destinations and travel services.

Targets of the “realization of a tourism nation” to be reached by 2016

Target type	Target associated with realization of a Tourism Nation	
Expand domestic consumption through tourism	1. Value of domestic travel consumption	30 trillion yen
Expand and develop international tourism	2. Number of foreign visitors to Japan	18 million
	3. Degree of satisfaction of foreign visitors to Japan	“Very satisfied” 45%, “Definitely want to visit again” 60%
	4. Number of international conferences	Increased by at least 50%, highest number of conferences of all Asian countries
	5. Number of Japanese tourists going overseas	20 million
Expand and develop domestic tourism	6. Number of stays per person in domestic tourist travel by the Japanese public	2.5 stays
	7. Degree of satisfaction of visitors to tourist areas	Overall degree of satisfaction “Very satisfied”, intention to revisit “Strongly agree”, both about 25%

Section 4 Measures that the government must implement comprehensively and systematically for the “realization of a tourism nation”

The following outlines the main four measures among those that the Japan Tourism Agency should tackle as it takes a leading role in tourism.

1 Create attractive tourist destinations favored by inbound and outbound visitors (form a tourist destination brand and encourage regional cooperation among several destinations, etc.)

With tourist destinations vulnerable to international competition to attract visitors, the immediate creation of highly attractive and internationally competitive tourist destinations that are favored by both inbound and outbound tourists is a must. To achieve this, it is essential to regularly evaluate tourist destinations that symbolize Japan and to promote the strategic creation of tourist destinations in line with the progress of regional efforts.

2 Conduct comprehensive promotions to encourage Japanese tourism

To win the competition with other countries to attract visitors, it is necessary to effectively and efficiently

expand Japan's ability to lure visitors from the middle tier of consumers in emerging economies such as Southeast Asia that are expected to show significant growth in coming years, from the European, American and Australian markets because those visitors stay longer on average, and from affluent markets because consumption by those visitors is expected to be high. We therefore intend to conduct comprehensive promotions to encourage Japanese tourism.

3 Strengthen the international competitiveness of MICE domains such as international conferences, etc.

MICE such as international conferences and exhibitions has wide-ranging economic significance in that it is having a significant economic ripple effect as well as creating business opportunities. However, in recent years international competition with various Asian nations to attract and hold conferences and exhibitions has been heating up and there are concerns that Japan's competitiveness is slipping relative to those other nations. Efforts to strengthen Japan's international competitiveness must be promoted.

4 Promote vacation reform

Vacation reform must be promoted to unearth latent demand and revitalize regional economies through expanded population exchanges.

Chapter 3 Effects of the Great East Japan Earthquake and Recovery

Section 1 Effects of the Great East Japan Earthquake on the Tourism Sector

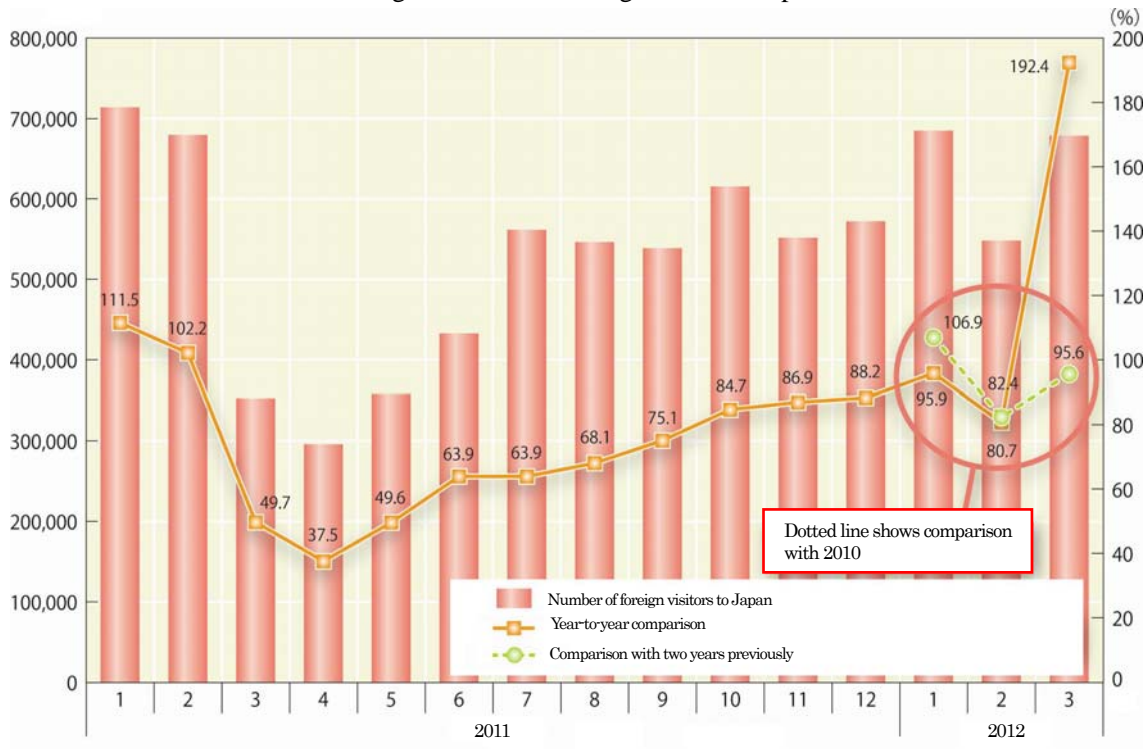
1 Trend in the number of foreign visitors to Japan

The number of foreign visitors to Japan showed year-to-year rises up to February 2011, but it dropped sharply in March of that year when the Great East Japan Earthquake occurred, down 49.7% from the same month the previous year. The difference is particularly noticeable when considering that the year-to-year comparison before the earthquake occurred (March 1 to 11, 2011) was 104% but dropped sharply to a year-to-year comparison of 27% after the earthquake occurred (March 12 to 31, 2011). The number of foreign visitors to Japan in 2011 was 6.22 million, a mere 72.2% of the number for 2010, which recorded an all-time high of 8.61 million. Notably, the number of foreign visitors for April 2011 immediately after the earthquake was 37.5% of the number for the same month the previous year, which was the largest ever decline on a monthly basis.

However, since May 2011 the year-to-year declines have gradually been getting smaller, and the number of foreign visitors to Japan can be said to be headed for recovery.

It is likely that considerable unease regarding travel to Japan immediately after the earthquake coupled with information issued by other countries urging their citizens to either refrain from traveling to Japan, postpone travel arrangements, or evacuate from Japan had a big impact on the trend in the number of foreign visitors to Japan. However, subsequent efforts by Japan to issue accurate information to foreign countries and to approach the governments of major countries seem to have reduced anxiety about travel to Japan.

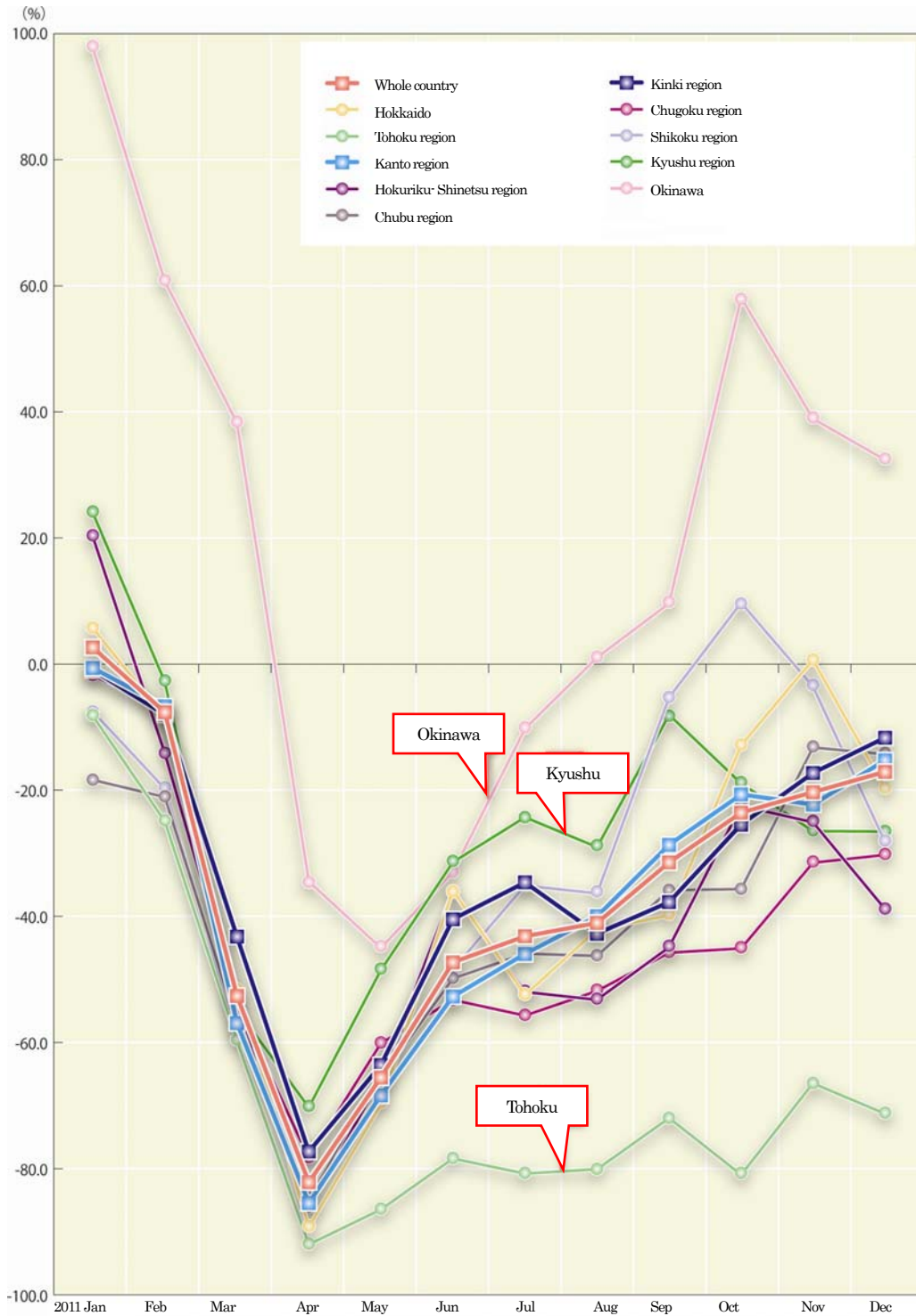
Change in Number of Foreign Visitors to Japan



- (Notes)
1. Prepared by the Japan Tourism Agency based on documents from the Japan National Tourist Organization
 2. Since the number of foreign visitors to Japan fell sharply in March 2011 due to the impact of the Great East Japan Earthquake, the year-to-year comparison for March 2012 is unusually high.
 3. The reason for the drop in the year-to-year comparison for February 2012 is that Chinese New Year fell at the beginning of February in 2011 but fell at the end of January in 2012.
 4. Year-to-year comparison for January and February combined in 2012 is 88.5% while comparison to the same period in 2010 is 94.4%.

A look at the year-to-year change in the number of overnight stays (total number) by foreign visitors to Japan by region shows that the number sharply declined in all regions immediately after the earthquake but has gradually been recovering in all regions, with the Kyushu region and Okinawa recovering at a rate above the national average. However, it is clear that the number in the Tohoku region remains unchanged since the drop, and while nationally the figure is heading for recovery, the situation in the Tohoku region is still severe.

Year-to-year change in number of foreign overnight guests by region



(Notes) 1. Based on "Statistics on Overnight Travel" by the Japan Tourism Agency

2. When calculating the year-to-year comparison, the results for lodging facilities with ten or more employees were used for January to March, and the results for all lodging facilities were used for April to December.

3. The Kanto region includes Yamanashi prefecture.

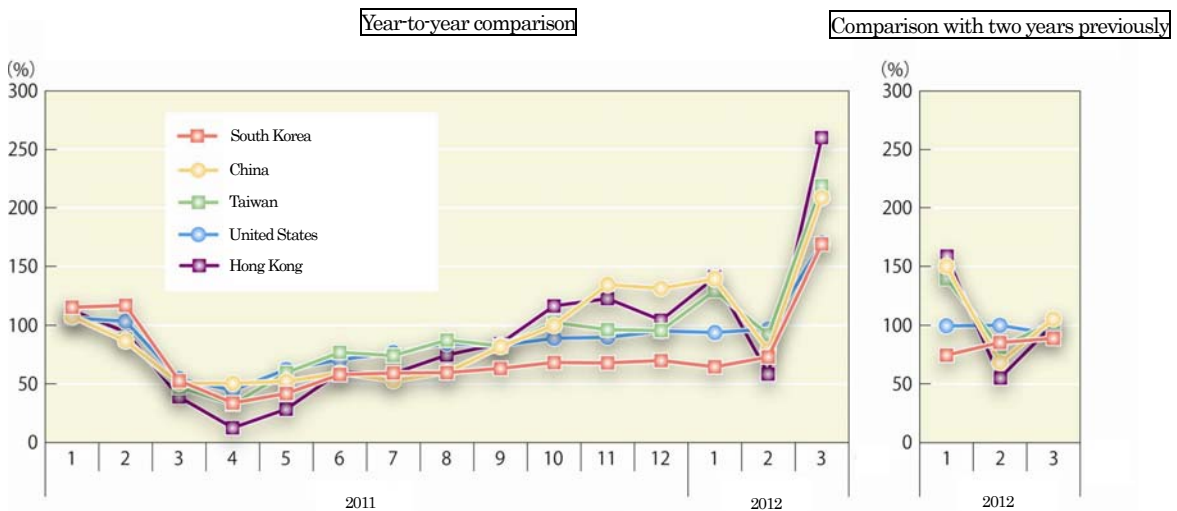
4. The Hokuriku-Shinetsu region consists of Niigata, Toyama, Ishikawa, and Nagano prefectures.

5. The Chubu region consists of Fukui, Gifu, Shizuoka, Aichi, and Mie prefectures.

6. The values for 2010 are the final figures, and the values for 2011 are provisional figures.

A look at the year-to-year change in the number of foreign visitors to Japan from the big five markets (South Korea, China, Taiwan, United States, and Hong Kong) by country or region shows that the recovery in guest numbers from South Korea is lagging. Likely causes are thought to be considerable anxiety lingering in South Korea compared with other countries regarding the effects of radiation owing to the numerous reports still being made about the nuclear power plant accident, and the continued high yen and low won. It is therefore necessary to adopt a carefully crafted approach to deal with the sentiments of South Korean consumers by, for example, effectively issuing reports to the South Korean market that convey the safety and security of Japan.

Change in the year-to-year comparison and comparison with two years previously of the number of foreign visitors to Japan from the five big markets (South Korea, China, Taiwan, United States, Hong Kong)



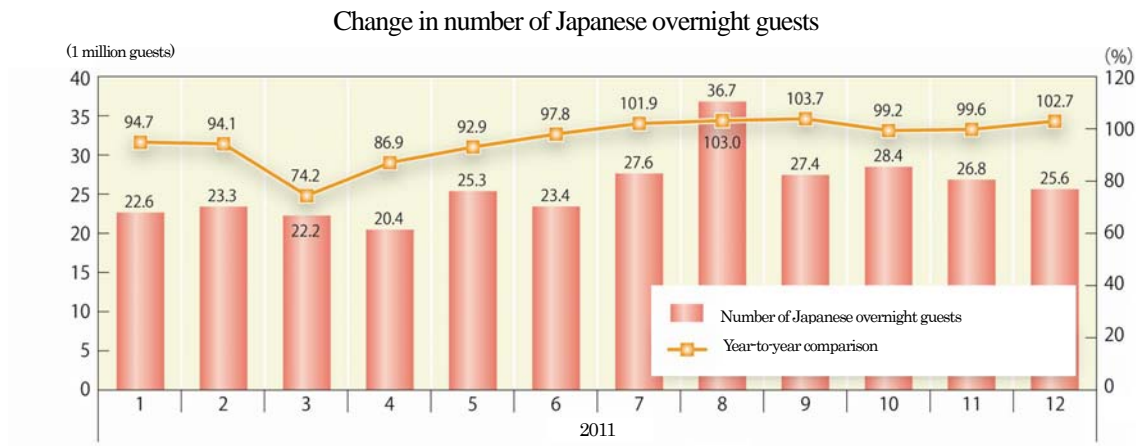
(Notes) 1. Prepared by the Japan Tourism Agency based on documents from the Japan National Tourist Organization

2. Since the number of foreign visitors to Japan fell sharply in March 2011 due to the impact of the Great East Japan Earthquake, the year-to-year comparison for March 2012 is unusually high.
3. The reason for the drop in the year-to-year comparison for February 2012 is that Chinese New Year fell at the beginning of February in 2011 but fell at the end of January in 2012.
4. The total for January and February 2012 shows a year-to-year comparison of 88.5% and a comparison with two years previously of 94.4%.

2 Trend in the number of Japanese overnight guests

The year-to-year comparison of the number of Japanese overnight guests (total number; the same applies below) for March 2011 was 74.2%. From April 2011, the size of the decline gradually shrank on a year-to-year basis, with the number for December of that year rebounding to 102.7% on a year-to-year basis. The number of Japanese overnight guests can therefore be said to be recovering.

The number of Japanese overnight guests in 2011 was 309.68 million^{*}, which was 95.9% compared with the number for 2010.



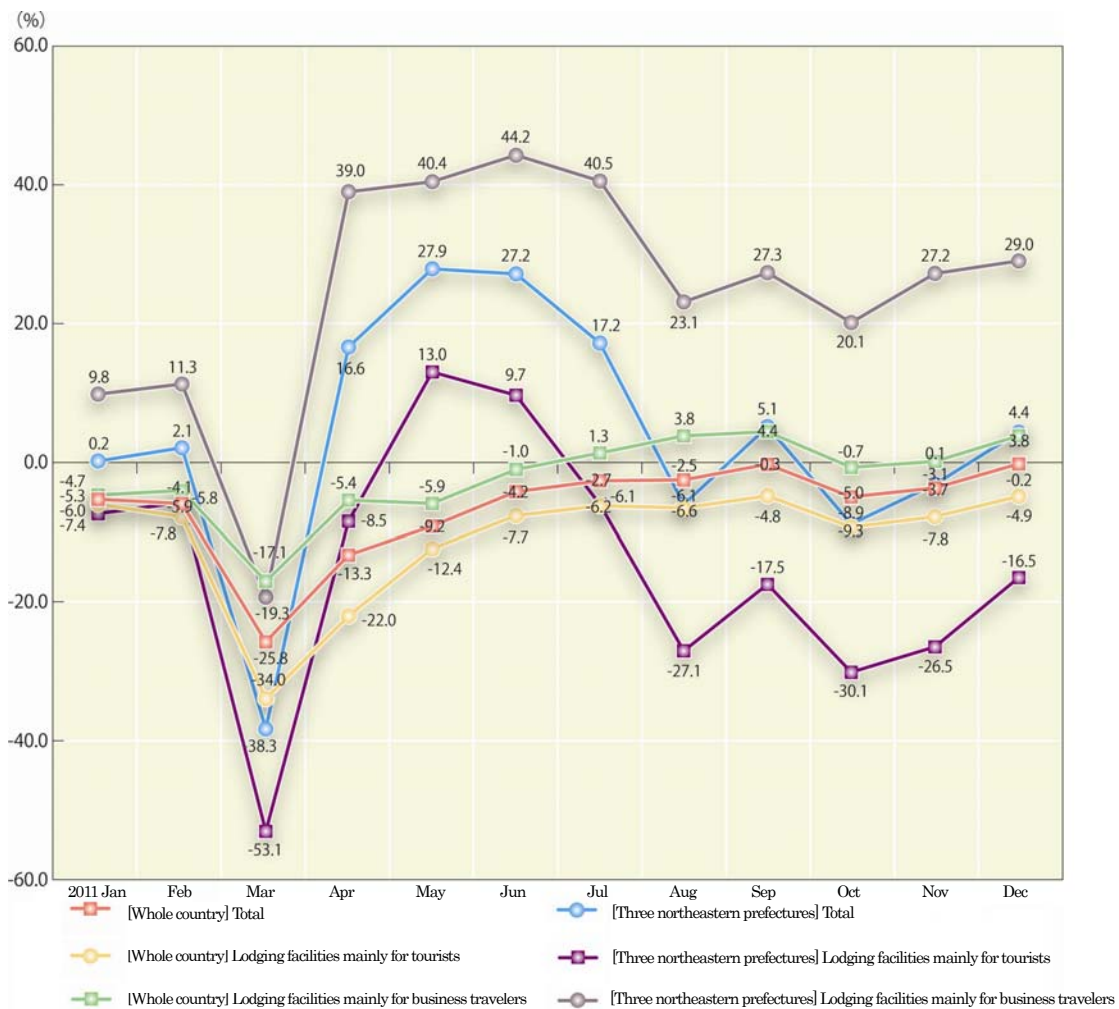
(Notes) 1. Based on "Statistics on Overnight Travel" by the Japan Tourism Agency

2. Results for lodging facilities with ten or more employees

3. The values for 2010 are the final figures, and the values for 2011 are provisional figures.

Comparing the year-to-year change in the number of Japanese overnight guests for the three prefectures where damage from the earthquake was greatest (Iwate prefecture, Miyagi prefecture, and Fukushima prefecture; referred to below as the three northeastern prefectures) against the number nationally, lodging facilities mainly for business travelers* in the three northeastern prefectures all show large increases from April 2011 onward. It is speculated that the reason for this is that many earthquake victims and people involved in the recovery and reconstruction process stayed at these facilities. It is likely that lodging facilities mainly for tourists* in the three northeastern prefectures experienced similar demand as lodging facilities mainly for business travelers immediately after the earthquake, and they show an upward trend, but from July 2011 the number shows a decline. It is considered that progress in moving earthquake victims into temporary housing had an impact on the number of overnight guests. At the same time, it is evident that tourism demand has not sufficiently recovered.

Year-to-year comparison of the number of Japanese overnight guests (three northeastern prefectures)



(Notes) 1. Based on "Statistics on Overnight Travel" by the Japan Tourism Agency

2. When calculating the year-to-year comparison, the results for lodging facilities with ten or more employees were used for January to March, and the results for all lodging facilities were used for April to December.

3. The values for 2010 are the final figures, and the values for 2011 are provisional figures.

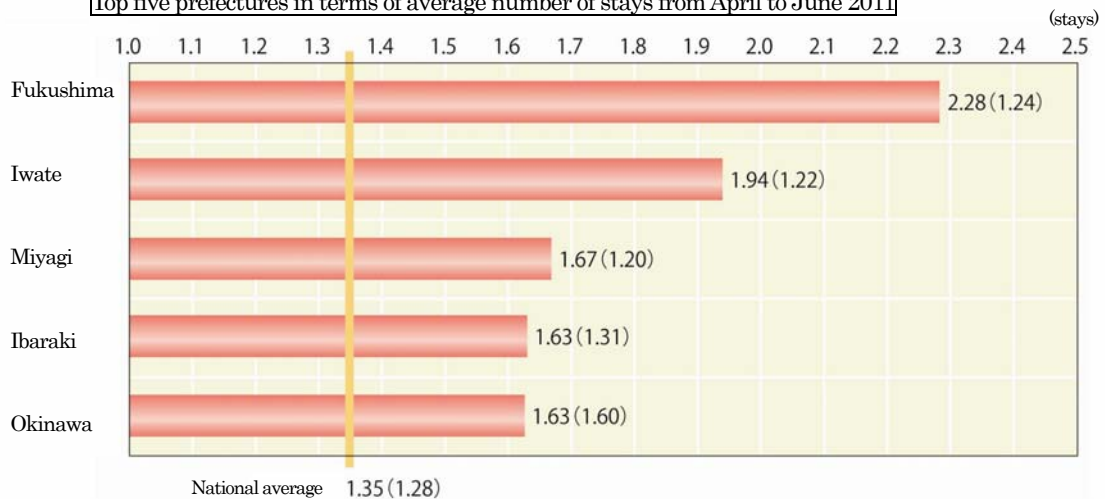
*1 Lodging facilities mainly for business travelers are lodging facilities where "fewer than 50% of guests are tourists".

*2 Lodging facilities mainly for tourists are lodging facilities where "at least 50% of guests are tourists".

Looking at the average number of overnight stays per person in the same facility, Okinawa, Tokyo, and Kyoto usually occupy the top positions. However, from April to June 2011 the three northeastern prefectures including Fukushima prefecture as well as Ibaraki prefecture occupy the top positions, and it is conjectured that long-term stays in these prefectures by earthquake victims and people involved in the recovery and reconstruction process affected the numbers.

Average number of overnight stays per person in the same lodging facility

Top five prefectures in terms of average number of stays from April to June 2011



Order of average number of stays

	2010				2011			
	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec	Jan-Mar	Apr-Jun	Jul-Sep	Oct-Dec
1st	Okinawa	Okinawa	Okinawa	Okinawa	Okinawa	Fukushima	Fukushima	Okinawa
2nd	Tokyo	Tokyo	Tokyo	Tokyo	Tokyo	Iwate	Okinawa	Fukushima
3rd	Kyoto	Shiga	Kyoto	Kyoto	Tokushima	Miyagi	Miyagi	Tokyo
4th	Akita	Kyoto	Ibaraki	Osaka	Kyoto	Ibaraki	Ibaraki	Miyagi
5th	Hokkaido	Hiroshima	Hyogo	Kanagawa	Miyagi	Okinawa	Akita	Ibaraki

(Notes) 1. Based on "Statistics on Overnight Travel" by the Japan Tourism Agency

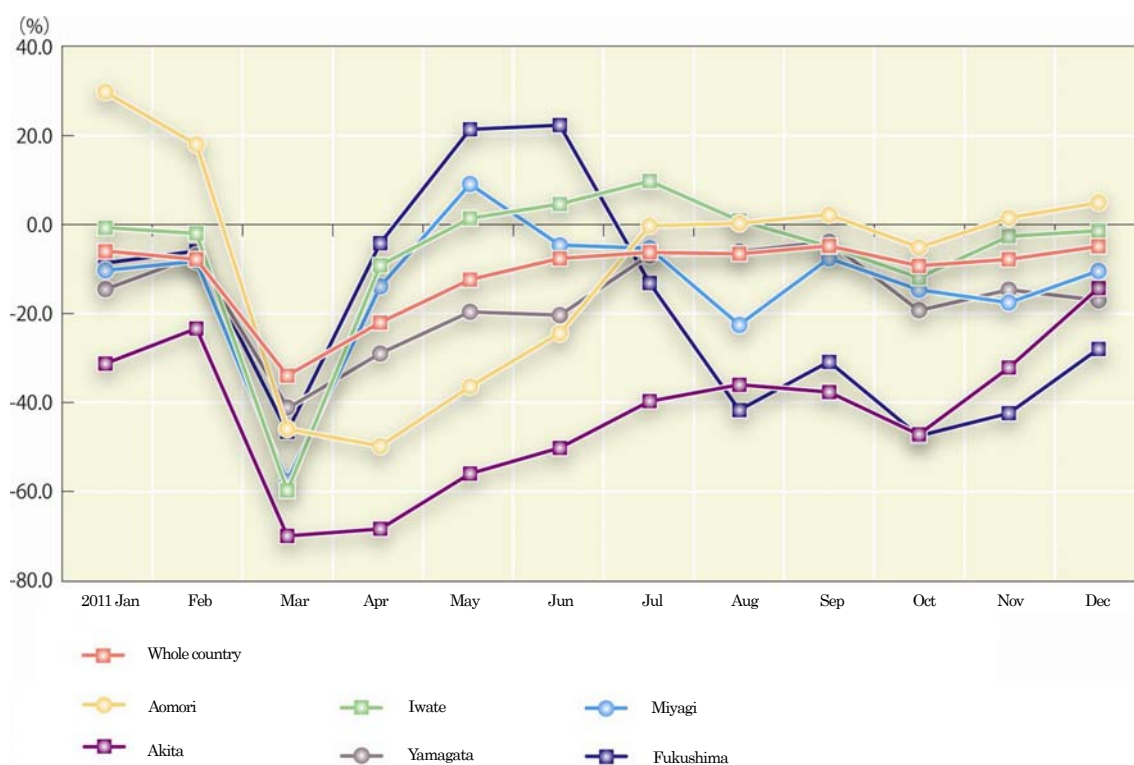
2. The figure in parentheses is the average number of guests for April to June 2010.

3. The results for lodging facilities with ten or more employees were used for January to March 2010, and the results for all lodging facilities were used for April to December 2010.

4. The values for 2010 are the final figures, and the values for 2011 are provisional figures.

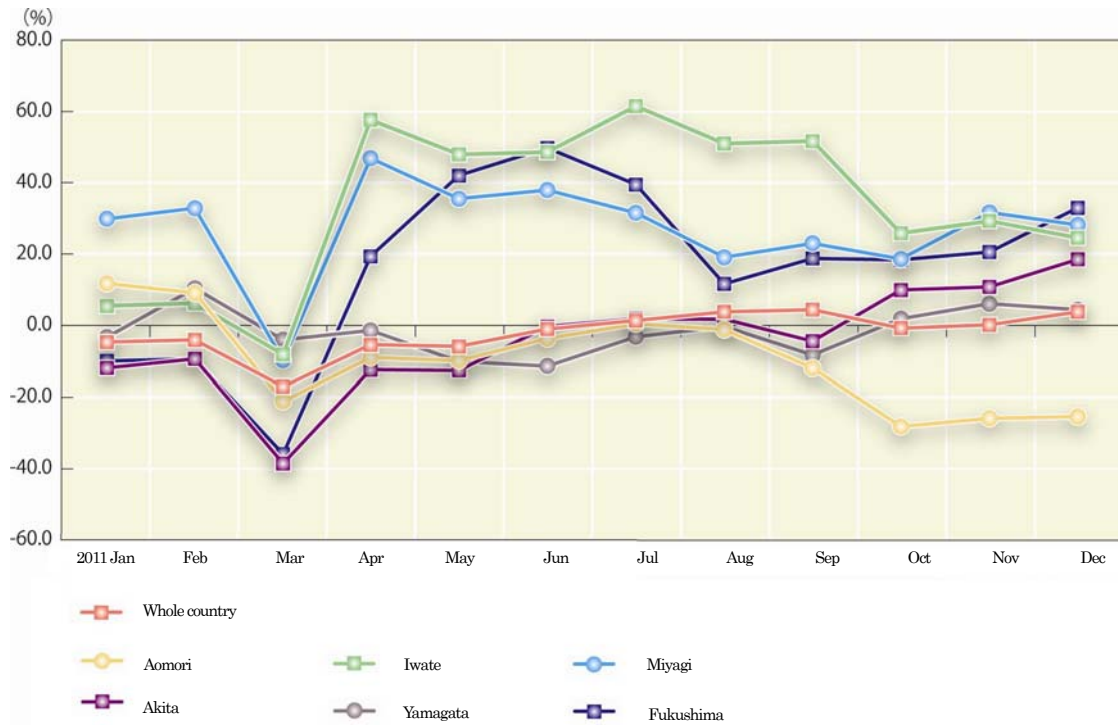
Looking at the year-to-year change in the number of Japanese overnight guests in prefectures of Tohoku other than the three northeastern prefectures, the data suggests that lodging facilities mainly for tourists were in a tough predicament immediately after the earthquake compared with the three northeastern prefectures where it is thought that there was temporary demand related with recovery and reconstruction. Nevertheless, the overall change shows a trend towards recovery and it is evident that tourism demand is gradually recovering. The data for lodging facilities mainly for business travelers suggests that the demand related with recovery and reconstruction that was seen in the three northeastern prefectures did not arise in the other prefectures of Tohoku.

Year-to-year comparison of the number of Japanese guests at lodging facilities mainly for tourists (prefectures of Tohoku)



(Notes) 1. Based on "Statistics on Overnight Travel" by the Japan Tourism Agency
 2. When calculating the year-to-year comparison, the results for lodging facilities with ten or more employees were used for January to March, and the results for all lodging facilities were used for April to December.
 3. The values for 2010 are the final figures, and the values for 2011 are provisional figures.

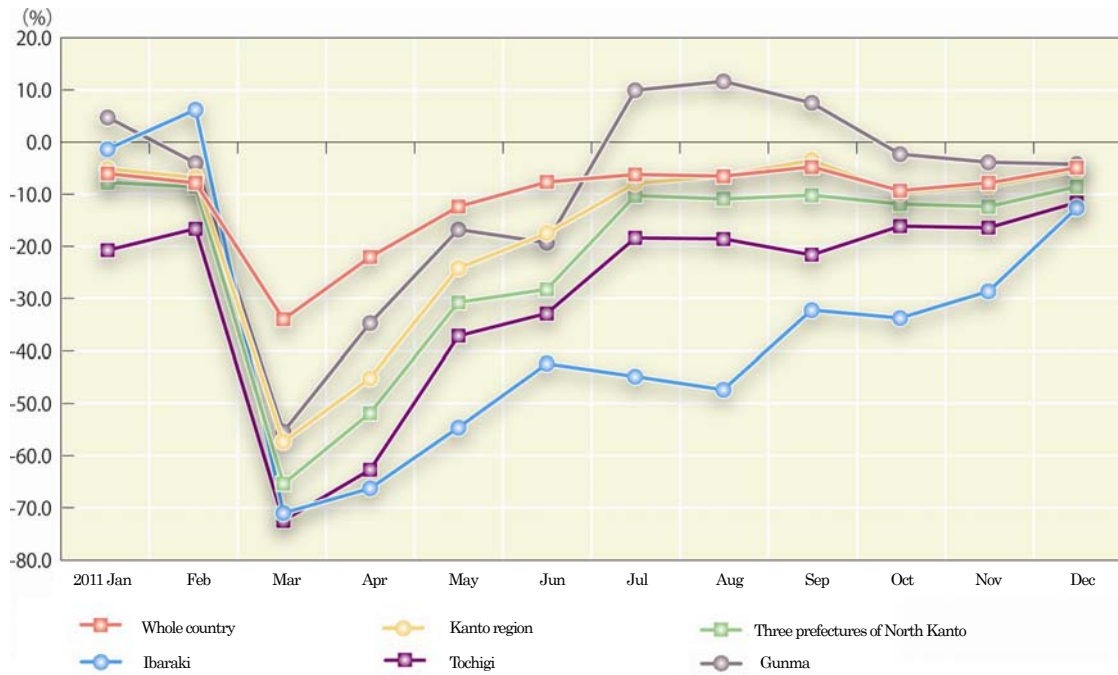
Year-to-year comparison of the number of Japanese guests at lodging facilities
mainly for business travelers (prefectures of Tohoku)



- (Notes)
1. Based on "Statistics on Overnight Travel" by the Japan Tourism Agency
 2. When calculating the year-to-year comparison, the results for lodging facilities with ten or more employees were used for January to March, and the results for all lodging facilities were used for April to December.
 3. The values for 2010 are the final figures, and the values for 2011 are provisional figures.

Similarly, looking at the three prefectures (Ibaraki prefecture, Tochigi prefecture, and Gunma prefecture) in North Kanto, it is evident that lodging facilities mainly for tourists were greatly affected compared with the national average particularly up to June 2011. In contrast, the number of Japanese guests at lodging facilities mainly for business travelers remains well above the national average only in Ibaraki prefecture, and the data suggests that this is because people involved in the recovery and restoration stayed in Ibaraki prefecture.

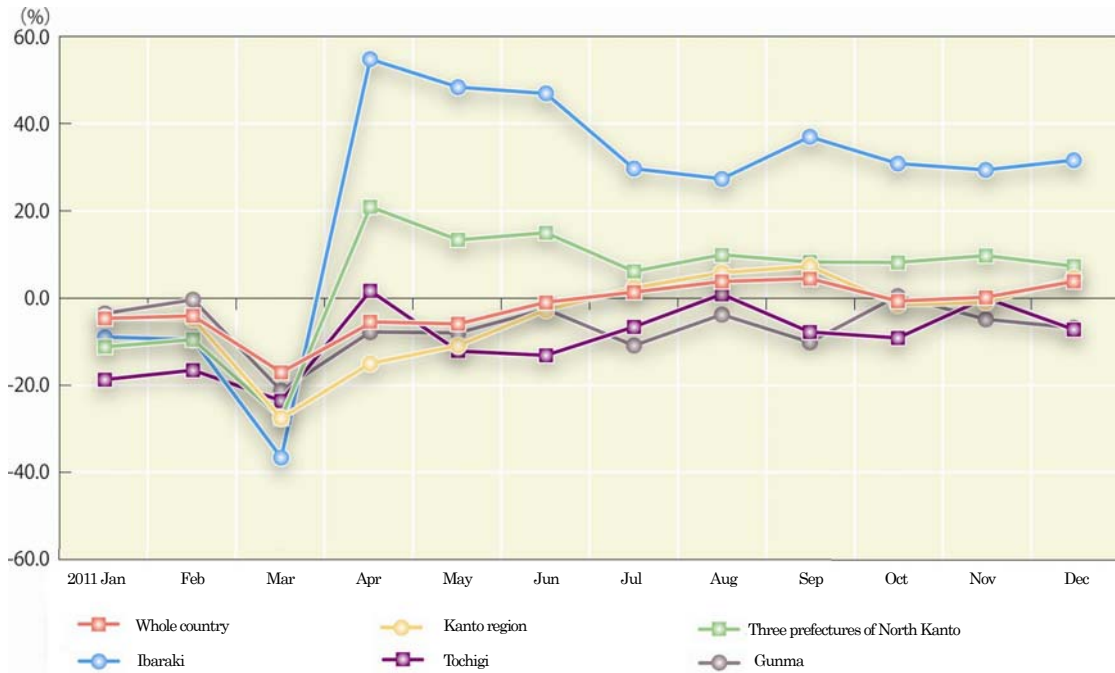
Year-to-year comparison of the number of Japanese guests at lodging facilities
mainly for tourists (Kanto region)



(Notes) 1. Based on "Statistics on Overnight Travel" by the Japan Tourism Agency

2. When calculating the year-to-year comparison, the results for lodging facilities with ten or more employees were used for January to March, and the results for all lodging facilities were used for April to December.
3. The values for 2010 are the final figures, and the values for 2011 are provisional figures.
4. The Kanto region includes Yamanashi prefecture.

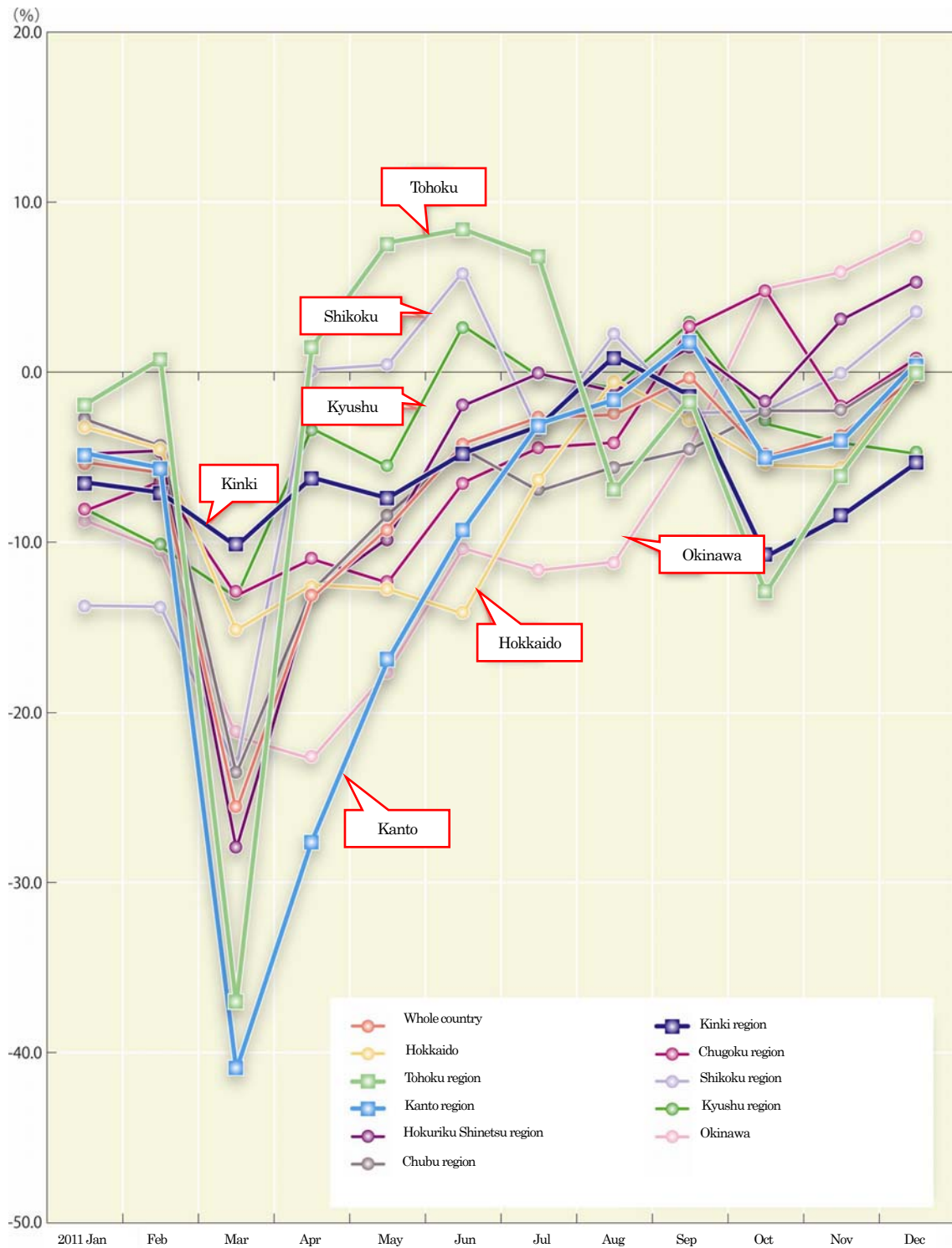
Year-to-year comparison of the number of Japanese guests at lodging facilities
mainly for business travelers (Kanto region)



- (Notes)
1. Based on "Statistics on Overnight Travel" by the Japan Tourism Agency
 2. When calculating the year-to-year comparison, the results for lodging facilities with ten or more employees were used for January to March, and the results for all lodging facilities were used for April to December.
 3. The values for 2010 are the final figures, and the values for 2011 are provisional figures.
 4. The Kanto region includes Yamanashi prefecture.

Looking at the year-to-year comparison of the number of Japanese guests by region, while it is evident that demand related with recovery and reconstruction arose in the Tohoku region as explained above, it is clear that the number of guests markedly declined in the Kanto region, which is geographically close to the disaster-affected areas, and in Hokkaido and Okinawa, where tourism rather than business accounts for much of the demand for lodgings, compared with the national average immediately after the earthquake. In contrast, it is evident that the decline in the number of guests was relatively small in the Kinki, Shikoku, and Kyushu regions compared with the national average, and it is discernible that the effect that the Great East Japan Earthquake had on the number of Japanese guests in all regions tended to be relatively less strong in western Japan.

Year-to-year comparison of the number of Japanese overnight guests by region



(Notes) 1. Based on "Statistics on Overnight Travel" by the Japan Tourism Agency

2. When calculating the year-to-year comparison, the results for lodging facilities with ten or more employees were used for January to March, and the results for all lodging facilities were used for April to December.

3. The Kanto region includes Yamanashi prefecture.

4. The Hokuriku-Shinetsu region consists of Niigata, Toyama, Ishikawa, and Nagano prefectures.

5. The Chubu region consists of Fukui, Gifu, Shizuoka, Aichi, and Mie prefectures.

6. The values for 2010 are the final figures, and the values for 2011 are provisional figures.

As described above, it can be confirmed that the number of foreign visitors to Japan and the number of Japanese overnight guests, which sharply declined immediately after the earthquake, is recovering nationally, led by western Japan. The vigor of this recovery exceeds the forecast for the scenario of the resurrection of Japan's tourism sector assumed by the World Travel and Tourism Council (referred to below as the WTTC). Nevertheless, it is also clear that although demand related with recovery and reconstruction can be discerned in some areas of the Tohoku region, tourism demand has not sufficiently recovered. It is therefore necessary to continue efforts to stimulate tourism demand nationally. Particularly in relation to the Tohoku region, it is necessary to support reconstruction to enable a large number of both tourists both from home and abroad to visit.

Section 2 Tourism Sector's Response to the Great East Japan Earthquake

1 Initial response

(1) Response dealing with travelers, lodging facilities and foreign visitors to Japan

After the earthquake, the relevant parties within the tourism sector not only worked together to confirm the safety of domestic travelers and check for damage to inns and hotels but also to put the system prescribed by the Disaster Relief Act into practice to support the intake of victims from other prefectures staying in inns and hotels.

Various items of information such as information about domestic transport infrastructure were provided in various languages on the website of the Japan National Tourist Organization (official name: (Independent administrative agency) International Promotion Agency (JNTO); referred to below as the Japan National Tourist Organization) for foreigners already in Japan or considering visiting Japan. The Tourist Information Centers (TIC), which are tourist offices for foreign visitors to Japan run by the Japan National Tourist Organization, provided 24-hour telephone inquiry support in multiple languages.

(2) Restoration of disaster-affected areas

① Restoration of transportation networks

Land, sea and air transportation networks were promptly restored because they are not only essential for implementing disaster recovery activities but also important for quickly restoring the tourism flow to the Tohoku region.

② Response to volunteer activities for supporting disaster-affected areas

To support volunteer activities immediately after the earthquake, the government encouraged the Japan Association of Travel Agents (referred to below as JATA) and All Nippon Travel Agents Association (ANTA) to proactively put together volunteer tours, and so travel agencies organized volunteer tours.



Volunteer activities

2 Subsequent measures

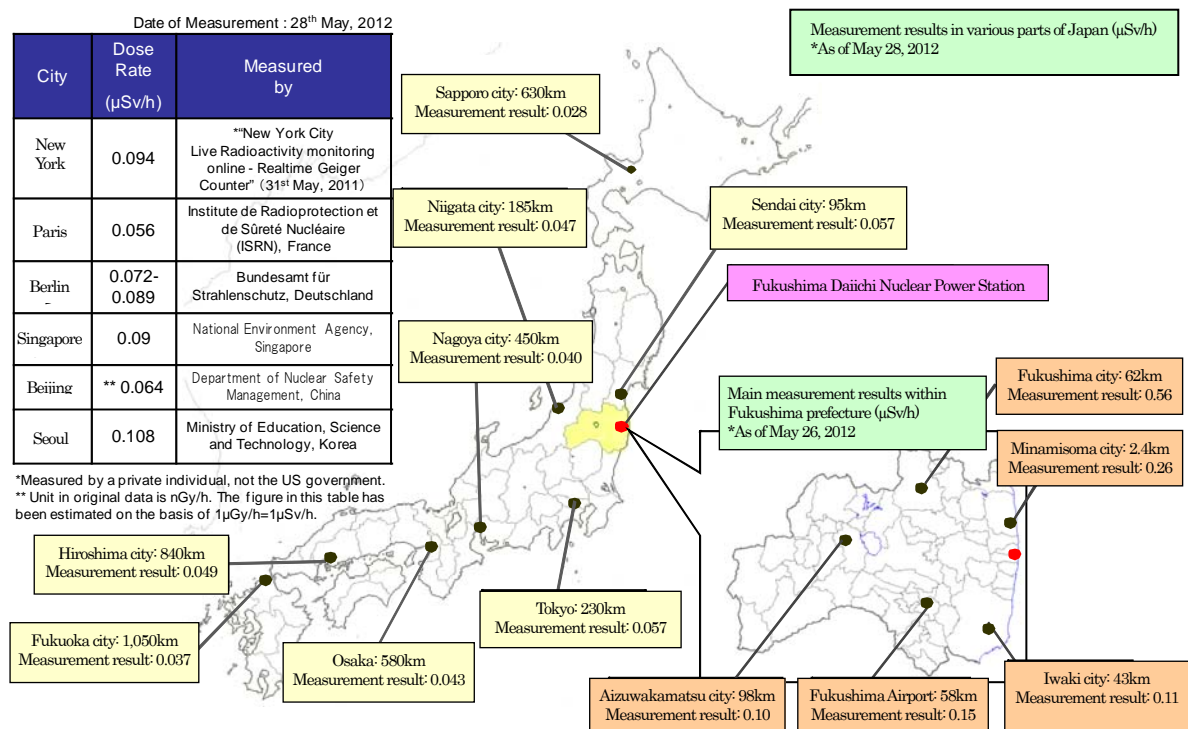
(1) Measures for encouraging foreigners to visit Japan

Starting immediately after the earthquake, the Japan Tourism Agency sought to disseminate accurate information. In a phased approach, the Japan Tourism Agency sought cooperation from the governments of major countries, invited media and travel agencies to visit Japan, and then appealed to general consumers. Efforts were also made to correct information about travel to Japan and to promote accurate coverage of the situation in Japan as well as the creation and sale of Japan travel products.

① Dissemination of accurate information and information about the latest situation in Japan

Information about radiation was provided on the JNTO website: the results of monitoring radiation across Japan and in major cities of the world were published as objective data as they became available.

Dissemination of radiation monitoring results



② Efforts asking the governments of major countries to revise travel information

The Japan Tourism Agency requested the governments of major countries to review the travel information issued outside Japan such as travel bans, restrictions, voluntary restraint, and warnings based on the latest scientific information.

③ Efforts encouraging international conferences to be held in Japan

The Japan Tourism Agency expeditiously provided accurate information to the organizers of international conferences and appealed to them to hold conferences in Japan while also striving to prevent the rise in the number of cancellations.



Appealing for the Artistic Gymnastics
World Championships Tokyo 2011
to be held as scheduled
(executive council meeting in San Jose, U.S.)

④“Visit Japan” campaign

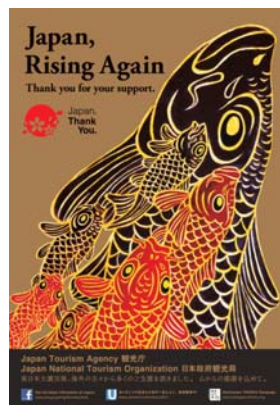
A campaign was implemented aimed mainly at increasing the momentum of welcoming foreign travelers to all parts of Japan.

⑤“Japan. Thank You.” campaign

In February 2012, a new campaign (Thank You) to express Japan’s gratitude to the world was begun in order to strengthen the ties between Japan and the world and lead to a recovery in the demand for travel to Japan.



Special logo



Special poster



Display on One Times Square building

⑥Holding WTTC Global Summit, etc.

The 12th WTTC Global Summit, which brings together the leaders of the world’s tourism industry, was held in Tokyo and Sendai from April 16 to 19, 2012.

The Japan Tourism Agency took the opportunities presented by the discussions at each session and site visits to disaster-affected areas to clarify the current situation regarding reconstruction and safety in Japan, particularly in disaster-affected areas, to the world’s tourism industry leaders and foreign media in order to dispel concerns about safety in Japan.



Prime Minister Noda



Maeda, then Minister of Land, Infrastructure, Transport and Tourism



Nishida, Chairman of the Japan Organizing Committee



Frenzel, Chairman, WTTC

(2) Measures to promote domestic tourism

① Domestic travel promotion campaign

To overcome the voluntary restraint in the field of tourism that was seen after the earthquake, the Japan Tourism Agency pronounced to prefectural and city governments and to tourism- and transport-related industries that ongoing efforts would contribute to the reconstruction.

Then in April 2011, the Japan Tourism Agency joined forces with the tourism- and transport-related industries to implement the joint public-private “domestic travel promotion campaign.”

② “Destination Tohoku” campaign

To stimulate the demand for tourism to the Tohoku region which suffered a slump after the earthquake, in March 2012 the Japan Tourism Agency earnestly initiated the “Destination TOHOKU Campaign,” which likened the entire Tohoku region to a kind of exposition venue. It divides the 28 major tourist destinations in the Tohoku region into core “zones” and aims, through the cooperation of the public and private sectors, to entice visitors to the Tohoku region.

③ Development of a movement to visit Tohoku and North Kanto

To mark the first anniversary since the earthquake, the public and private sectors came together and threw all their weight behind a national movement starting in March 2012 to support the restoration of Tohoku and North Kanto by holding various conventions in Tohoku and North Kanto.

④ Support of various events related to the Tohoku region

The Japan Tourism Agency supported various events related to the Tohoku region that were held to aid the restoration.

Section 3 Cases of Recovery and Restoration From Natural Disasters That Have Affected Inbound and Outbound Tourism

1 Domestic cases

(1) Great Hanshin-Awaji Earthquake

By 1998, tourist numbers in Kobe had recovered to the level prior to the earthquake. A particular boost to the recovery was Kobe Luminarie, which was held every year from December 1995 as a requiem for the victims and in hope of the restoration and revitalization of the city and which has now become a representative event of the city of Kobe. This is likely because, in addition to the lure of the event itself, its themes of “passing on the memory of the earthquake” and “praying for the repose of the victims” carry great meaning. It is as though the fact that Kobe Luminarie has gained the sympathy of visitors through its significance and spirituality as a requiem event in addition to its tourism aspect has made it a big attraction.

The Disaster Reduction and Human Renovation Institution which was opened in Kobe in 2002, seven years after the earthquake, is also an example of transforming memories of the disaster into a new tourism resource. Visitors to this facility, which was established with the aim of passing down the lessons learned from the earthquake to future generations, can listen to the experiences of victims, who serve as storytellers, and experience the earthquake for themselves. The more than half a million visitors per year include many students on school excursions.



Disaster Reduction and Human Renovation Institution

(2) Noto Peninsula Earthquake

Reconstruction efforts including promotional activities take diverse forms, but particularly noteworthy is the fact that the “Noto Furusato Haku (This is Noto)” and “Kagayonto Haku” expositions, each organized through the joint efforts of affected cities and towns in the respective regions, have had results far exceeding initial expectations. The “This is Noto” campaign was jointly developed by four cities and five towns in the Noto region and is running since 2008, and the “Kagayonto Haku” campaign was jointly developed by four hot springs (Yamanaka Onsen, Yamashiro Onsen, Katayamazuru Onsen, Awazu Onsen) in Kaga city and Komatsu city started in the same year. The boost that was given to each of these regional grass-roots movements by the expositions under the goal of reconstruction has proved to be a huge asset to each of these regions.

For example, the “This is Noto” campaign runs the “Akari de tsunagu Notohanto (Connecting Noto Peninsula by light)” event which is based around the theme of “light” and aims to link four cities and five towns. Events featuring light are held in each of the four cities and five towns, as exemplified by “Senmaida Light Up” (Wajima city) during which the banks of the terraced rice fields after harvesting are lit by 30,000 candles. These events create a fantastical landscape and continue to convey the memory of the disaster to visitors.

A one-of-a-kind information campaign unique to Kaga is “Lady Kaga,” which was born from the collaboration of people working in hospitality in Kagayonto. It was launched in October 2011 by Ishikawa Ryokan and Hotel Association Youth Group Kaga and consists of a group of more than 100 women including proprietresses working in Kagayonto under the name “Lady Kaga”. They continue to promote the charm of Kagayonto through the Internet and media.



Lady Kaga

Source: Lady Kaga official website

2 Overseas cases

(1) Sumatra Earthquake (Thailand)

In 2007, the Thai government set up TIC (Tourism Intelligence Unit and Crisis Management Centre) whose mission is to gather and analyze information both from within the country and abroad for the purpose of preventing the tourism industry from being significantly affected in the event of a disaster etc. TIC is positioned within TAT (Tourism Authority of Thailand), which is the equivalent to Japan's Japan National Tourist Organization.

Thus Thailand has established a system aimed at taking advantage of the lesson learned from the major blow that tourism suffered as the result of harmful rumors when the natural disaster occurred, and at preventing or minimizing harmful rumors following a disaster.

In addition, attention has been paid to measures to ensure the safety of tourists after a disaster. After the disaster, a network was constructed for swiftly transmitting disaster information to hotels, eateries, and stores in the event of a disaster, and evacuation drills in preparation for a tsunami were carried out around the country. In addition, there are plans to train volunteer interpreters in the future for ensuring the safety of foreign tourists in the event of a disaster.

(2) Hurricane Katrina (New Orleans, United States)

In New Orleans, the "tourism crisis management plan" established as a measure to secure the safety of tourists in a disaster was significantly revised after the disaster, and all possible means have been expended to ensure the safety of tourists by guaranteeing a means of communication with residents and tourists when a disaster occurs.

The idea is to evacuate systematically in accordance with the procedure prescribed in the tourism crisis management plan when it becomes necessary to evacuate tourists outside the city.

Thus New Orleans has established a routine system for securing the safety of tourists. In addition, not only does the city run evacuation drills for New Orleans residents every year but it also revises its tourism crisis management plan every year to constantly guarantee the safety of tourists and residents under optimal conditions.

Section 4 Conclusion

There are numerous instances where harmful rumors have caused torment to a disaster-stricken area. Although it is difficult to completely stop rumors from starting, it is necessary to make the effort to minimize the harm caused by rumors. As seen with the example of the Sumatra Earthquake, it is important to quickly collect accurate information and disseminate it accurately to prevent harmful rumors. It is for that reason that Thailand has set up a system for unilaterally collecting and transmitting information in an emergency. Thus it is an important perspective to establish a system in ordinary times that can handle emergency situations.

For tourists to be able to travel with an easy mind, an essential requirement is for tourists' security to be guaranteed in a disaster. As seen with the example of Hurricane Katrina, cases where this fact is noted at the time of a disaster and a system is established serve as useful references.

Furthermore, it is possible to learn from past experience that the memory of a disaster itself can have an appeal as a new tourism resource. As the case of Kobe Luminarie shows, the fact that people empathize with the significance of visiting such a place seems to have a powerful effect in drawing people. The A-Bomb Dome, which engraves harrowing memories of war, is still a defining tourist spot of Japan. Perhaps by touching on the memory of a disaster, people feel not only the threat of nature but also the strength of people facing that threat.

Tourism promotion is primarily the task of creating sufficient appeal so that people will go to the effort of visiting a place. Even while valuing enduring attractions rooted in the local culture, tradition, and nature, it is important to constantly create new enticements and advertise them without relying on existing tourism resources or past successful experiences. If Japan can manage to overcome the crisis of the Great East Japan Earthquake, rediscover the allure of Japan and mold it into a new tourism resource, a new horizon will likely open up for tourism not only in the Tohoku region but in the whole of Japan.

Part II Status of Tourism and Measures in FY2011

Chapter 1 Current Status of Tourism

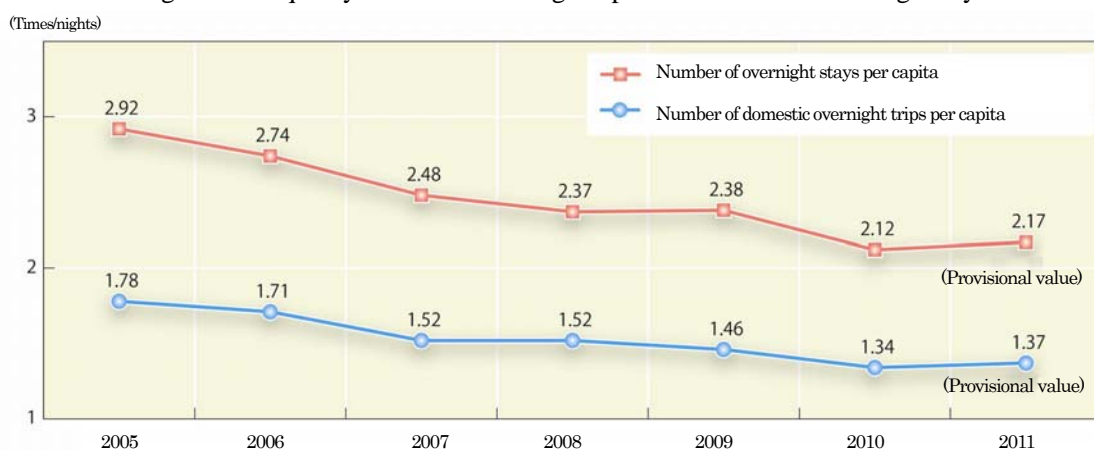
Section 1 Trends in Tourism by the Japanese Public

1 Trends in domestic overnight trips by the Japanese public

(1) Overview of domestic overnight tourist travel

The frequency of overnight domestic travels per capita of the Japanese population in 2011 is estimated to have been 1.37 times, an increase of 2.2% on a year-to-year basis. Meanwhile, the number of overnight stays on domestic travel per capita is estimated to have been 2.17 nights, an increase of 2.4% on a year-to-year basis.

Change in the frequency of domestic overnight trips and the number of overnight stays

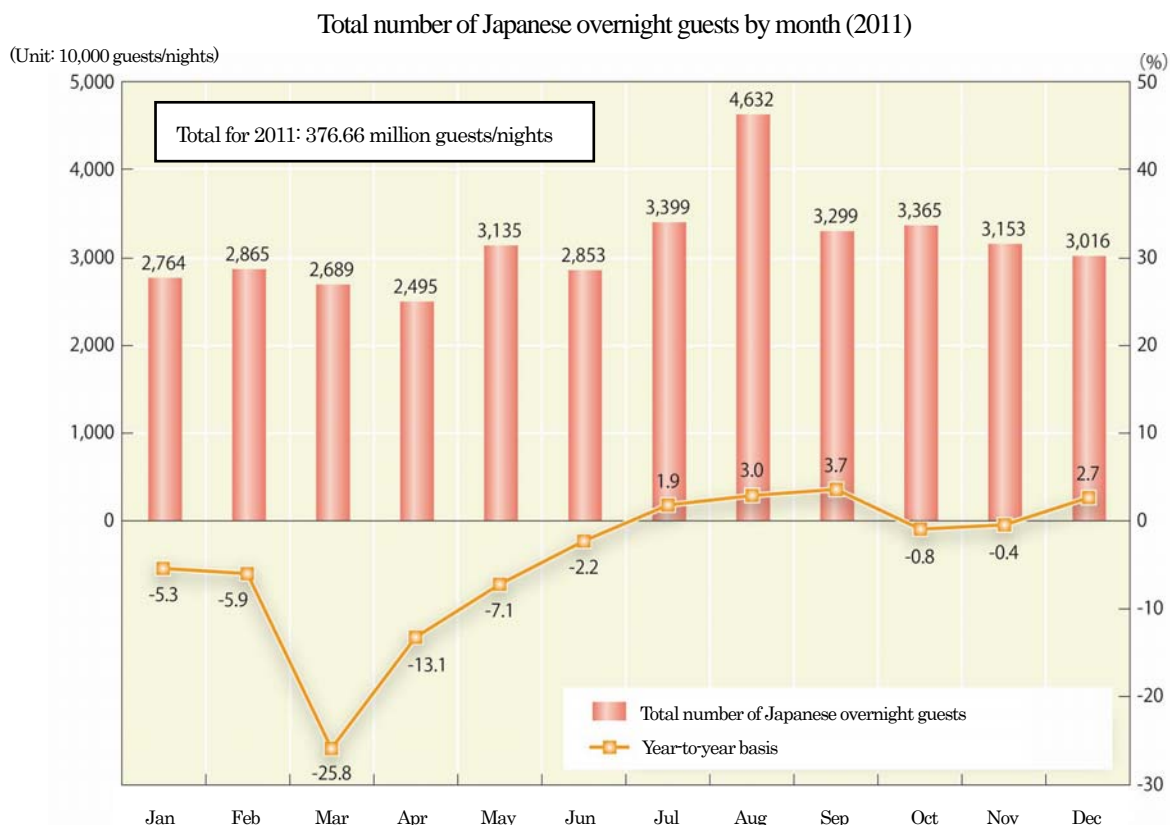


(Notes) 1. Based on "Travel and Tourism Consumption Trend Survey" by the Japan Tourism Agency

2. Values for 2011 are provisional.

(2) Overview of overnight trips

The total number of overnight guests in 2011 was 394.22 million guests/nights overall, of which the total number of Japanese guests was 376.66 million guests/nights. When looking at the figures by month, August was the busiest with 46.32 million guests/nights, while April was the quietest with 24.95 million guests/nights. On a year-to-year basis, March was markedly down from the previous year.



(Notes) 1. Based on “Statistics on Overnight Travel” by the Japan Tourism Agency

2. The year-to-year basis is the result for lodging facilities with at least ten employees.

3. The values do not reflect data for lodging facilities that were newly built or closed during the year so the final figures may differ slightly.

2 Trends in overseas travel by the Japanese public

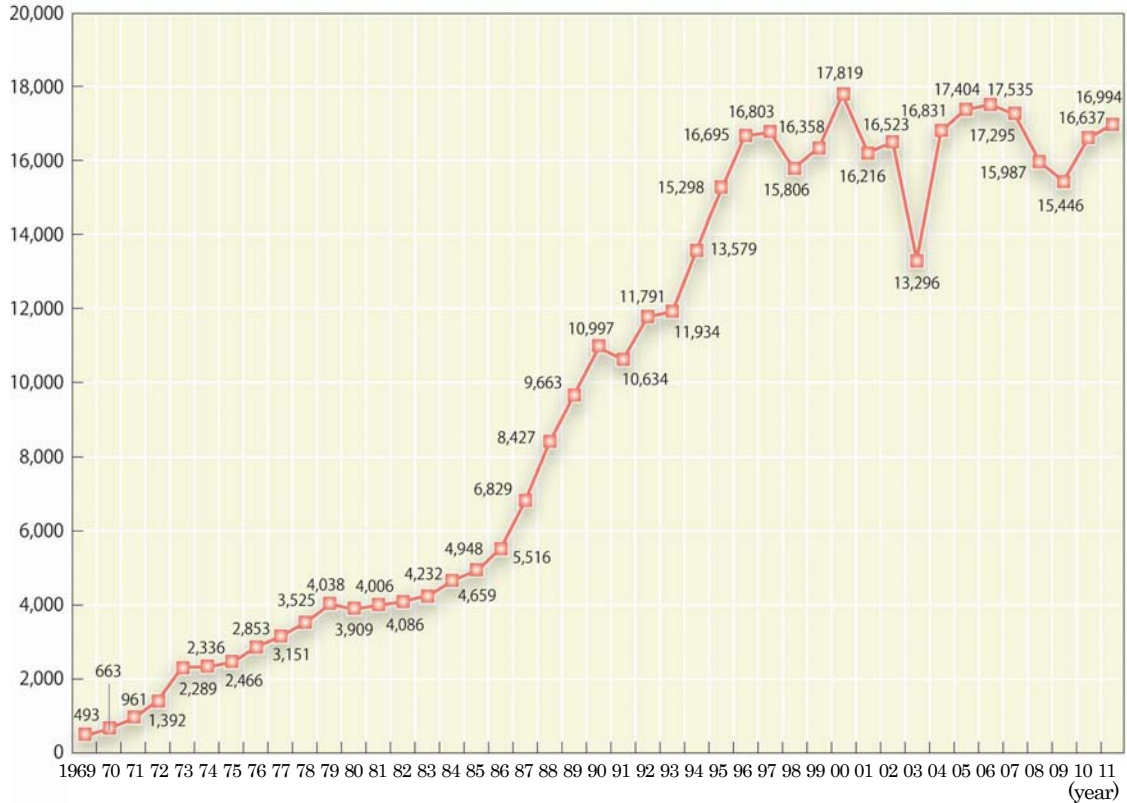
(1) Change in the number of travelers going overseas

The number of Japanese travelers going overseas in 2011 was 16.99 million. Compared with the previous year, this represented an increase of around 360,000 or 2.1%.

On a year-to-year basis, the growth rate was highest for December and low for March to June.

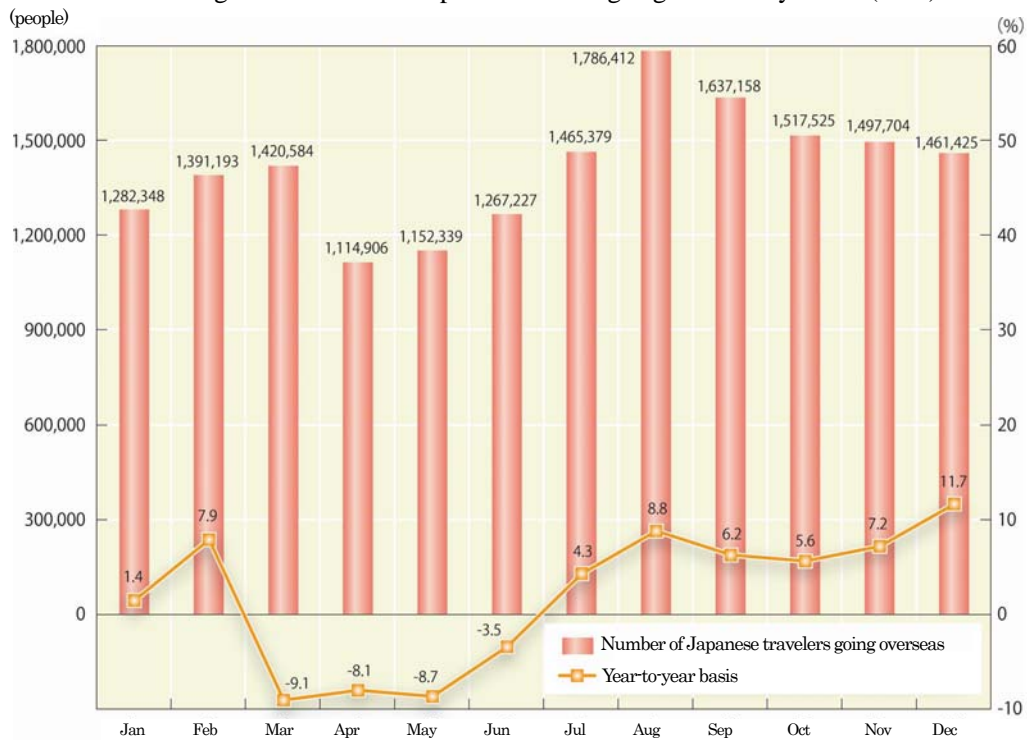
Change in the number of Japanese travelers going overseas

(Unit: 1000)



(Notes) Prepared by the Japan Tourism Agency from data provided by the Ministry of Justice

Change in the number of Japanese travelers going overseas by month (2011)



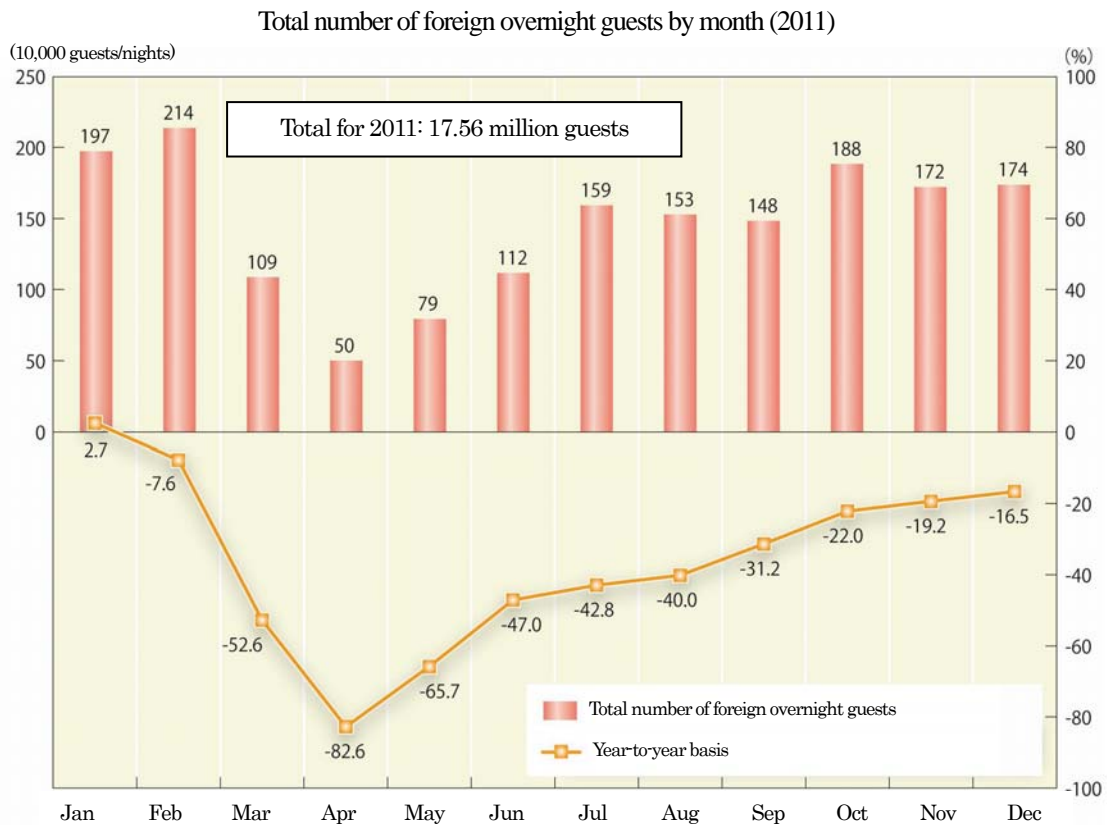
(Notes) Prepared by the Japan Tourism Agency from data provided by the Ministry of Justice

Section 2 Trends in Visits to Japan by Foreign Tourists

1 Trends in overnight trips by foreign tourists

(1) Overview of overnight trips

The total number of foreign guests in 2011 was 17.56 million guests/night (a decrease of 36.2% on a year-to-year basis). On a year-to-year basis, all months from March onward showed significant declines from the previous year.



(Notes) 1. Based on "Statistics on Overnight Travel" by the Japan Tourism Agency

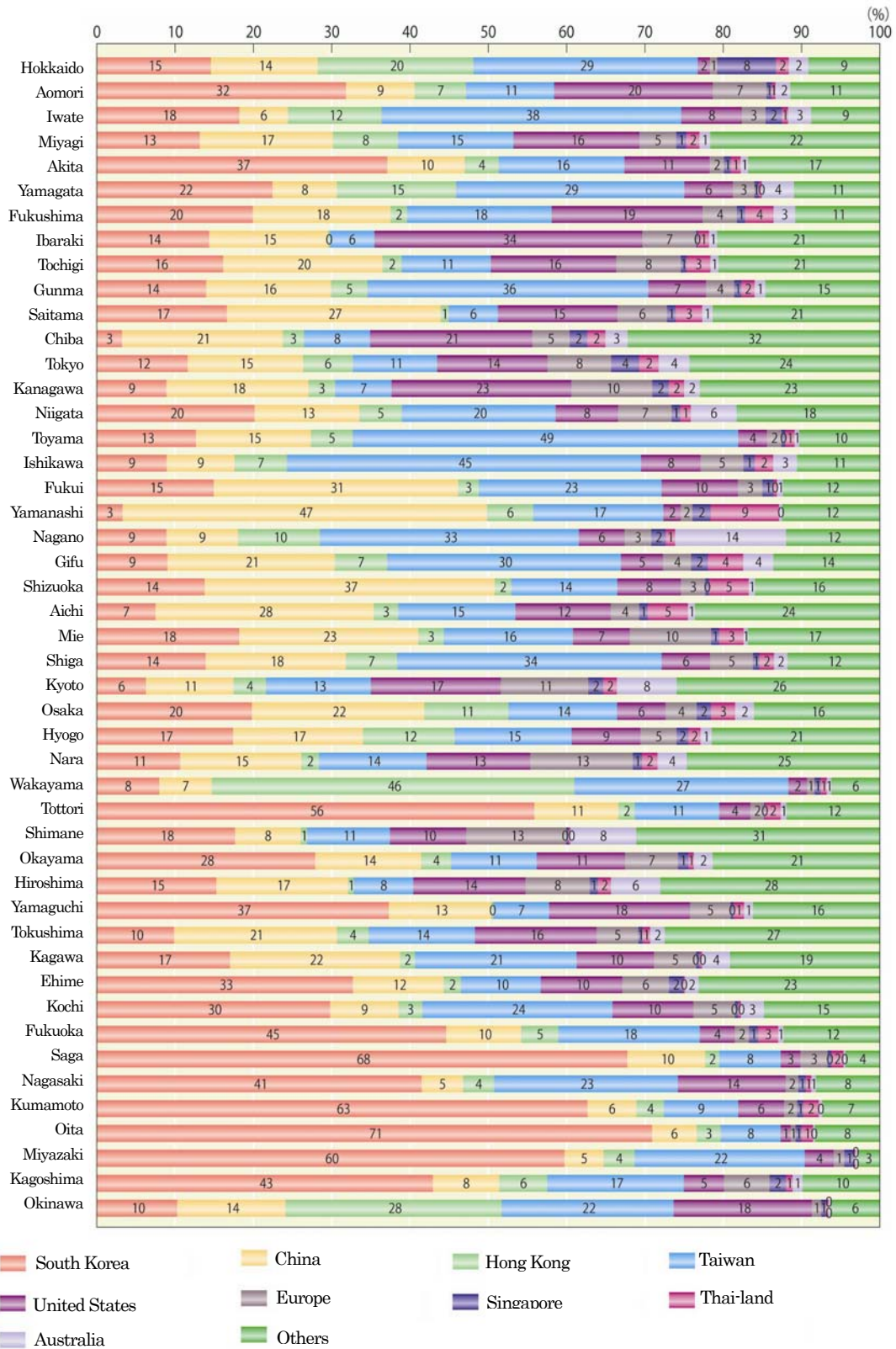
2. "Foreign nationals" are visitors who do not have an address in Japan.

3. The year-to-year basis is the result for lodging facilities with at least ten employees.

4. The values do not reflect data for lodging facilities that were newly built or closed during the year so the final figures may differ slightly.

Looking at the composition ratios by prefecture of all foreign nationals making overnight stays categorized by country or region of origin, the data suggests that many of those visiting Kyushu were from South Korea, and many visiting Hokkaido and Hokuriku were from Taiwan.

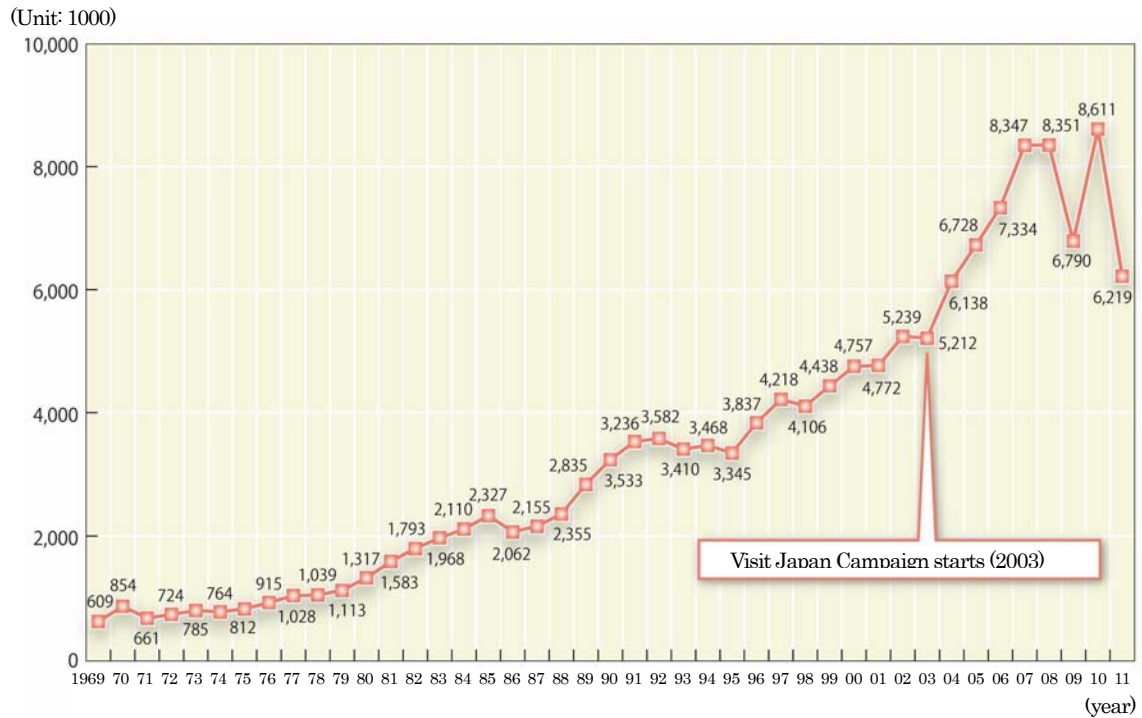
Composition ratios by prefecture of all foreign nationals making overnight stays,
by country or region of origin (2011)



- (Notes)
1. Based on "Statistics on Overnight Travel" by the Japan Tourism Agency
 2. "Foreign nationals" are visitors who do not have an address in Japan.
 3. "Europe" consists of Germany, the UK and France.
 4. The results are for lodging facilities with at least ten employees.
 5. The values do not reflect data for lodging facilities that were newly built or closed during the year so the final figures may differ slightly.

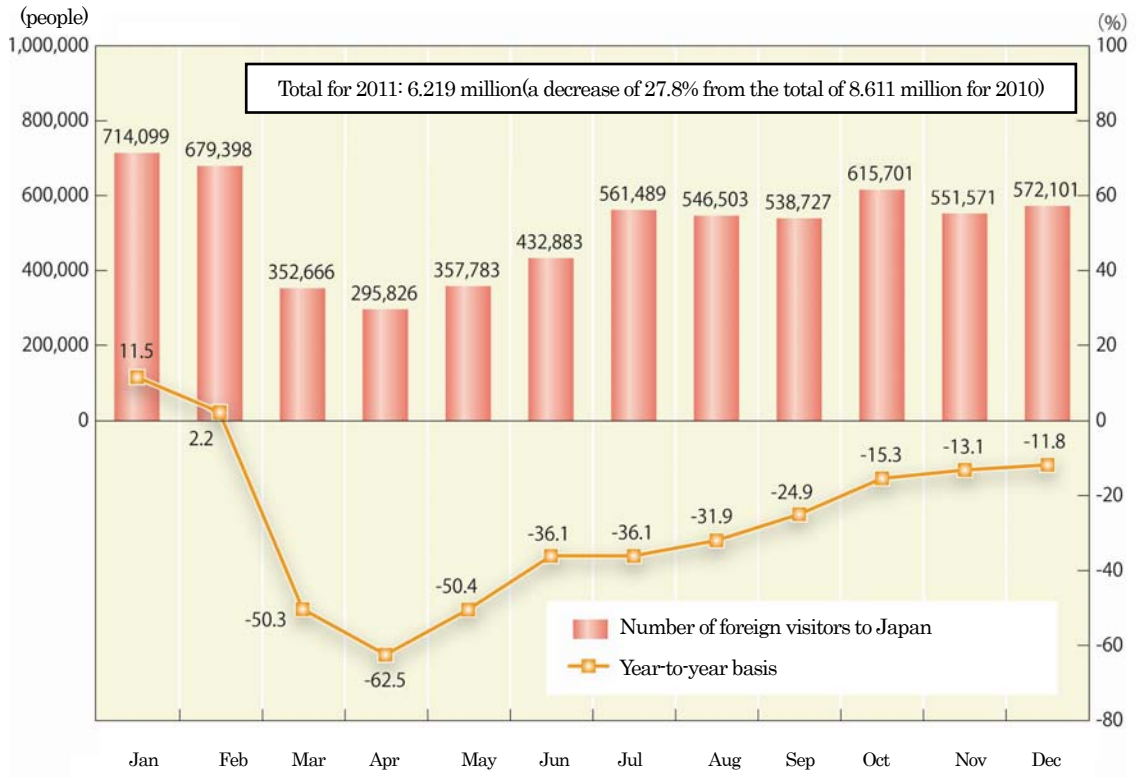
The number of foreign visitors to Japan in 2011 was 6.22 million (a decrease of 27.8% from the previous year), which was significantly lower than the previous year. On a monthly basis, the number of travelers for each month from March onward was lower than that for the previous year.

Change in the number of foreign visitors to Japan



(Note) Prepared by the Japan Tourism Agency from data provided by the Japan National Tourist Organization

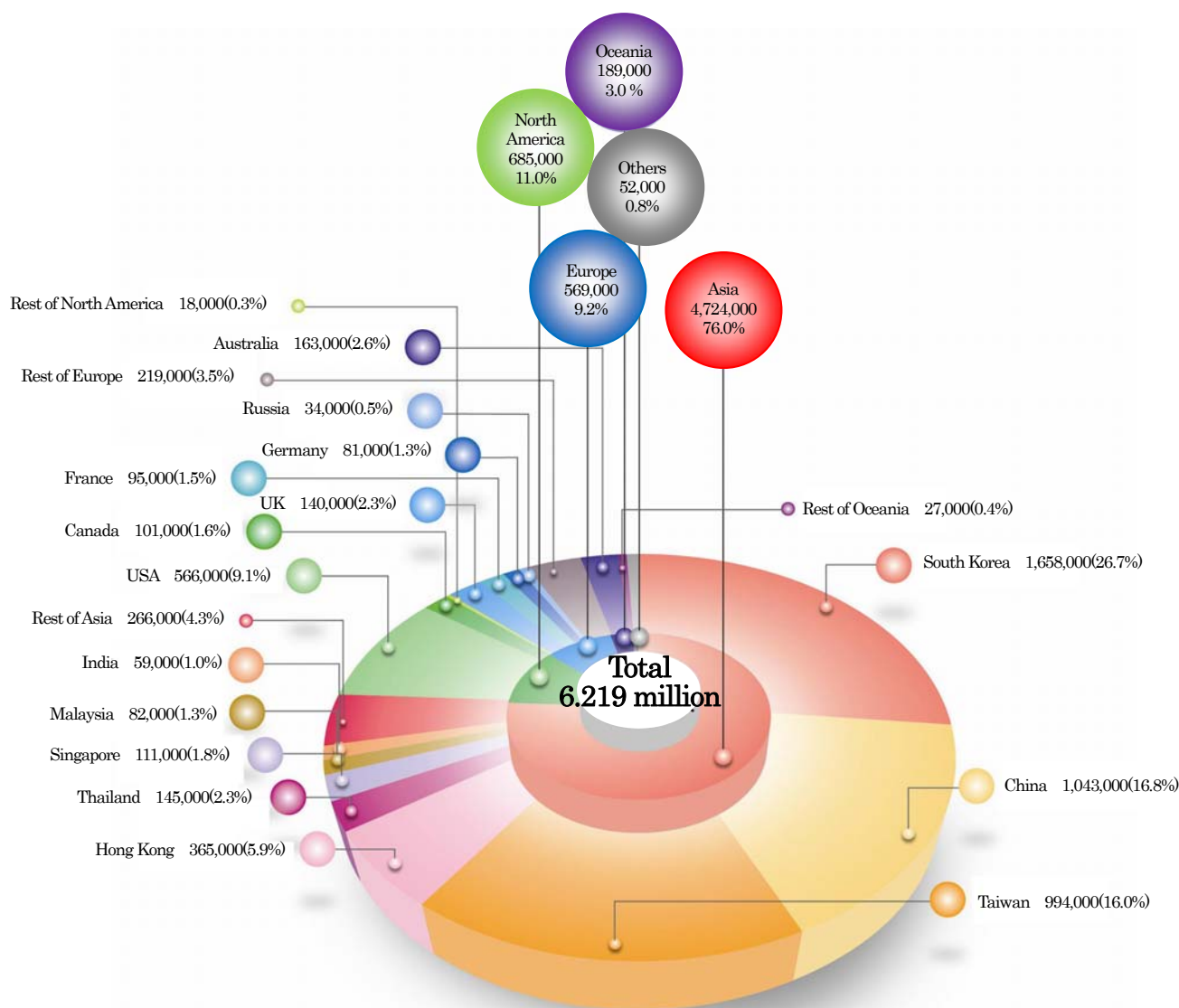
Change in the number of foreign visitors to Japan by month (2011)



(Note) Prepared by the Japan Tourism Agency from data provided by the Japan National Tourist Organization

In terms of the number of foreign visitors to Japan by continent of origin, 4.72 million people visited from Asia, which was 76.0% of the overall number, followed by 690,000 people from North America (11.0%), 570,000 people from Europe (9.2%), and 190,000 people from Oceania (3.0%). When the number of foreign visitors is viewed by country or region of origin, South Korea tops the list with 1.66 million people (a decrease of 32.0% from the previous year). This figure is followed by 1.04 million people from China (a decrease of 26.2%), 990,000 people from Taiwan (a decrease of 21.6%), 570,000 people from the United States (a decrease of 22.2%), and 360,000 people from Hong Kong (a decrease of 28.3%). The numbers for all countries and regions showed a year-to-year decrease.

Proportions of foreign visitors to Japan by continent and by country or region (2011)



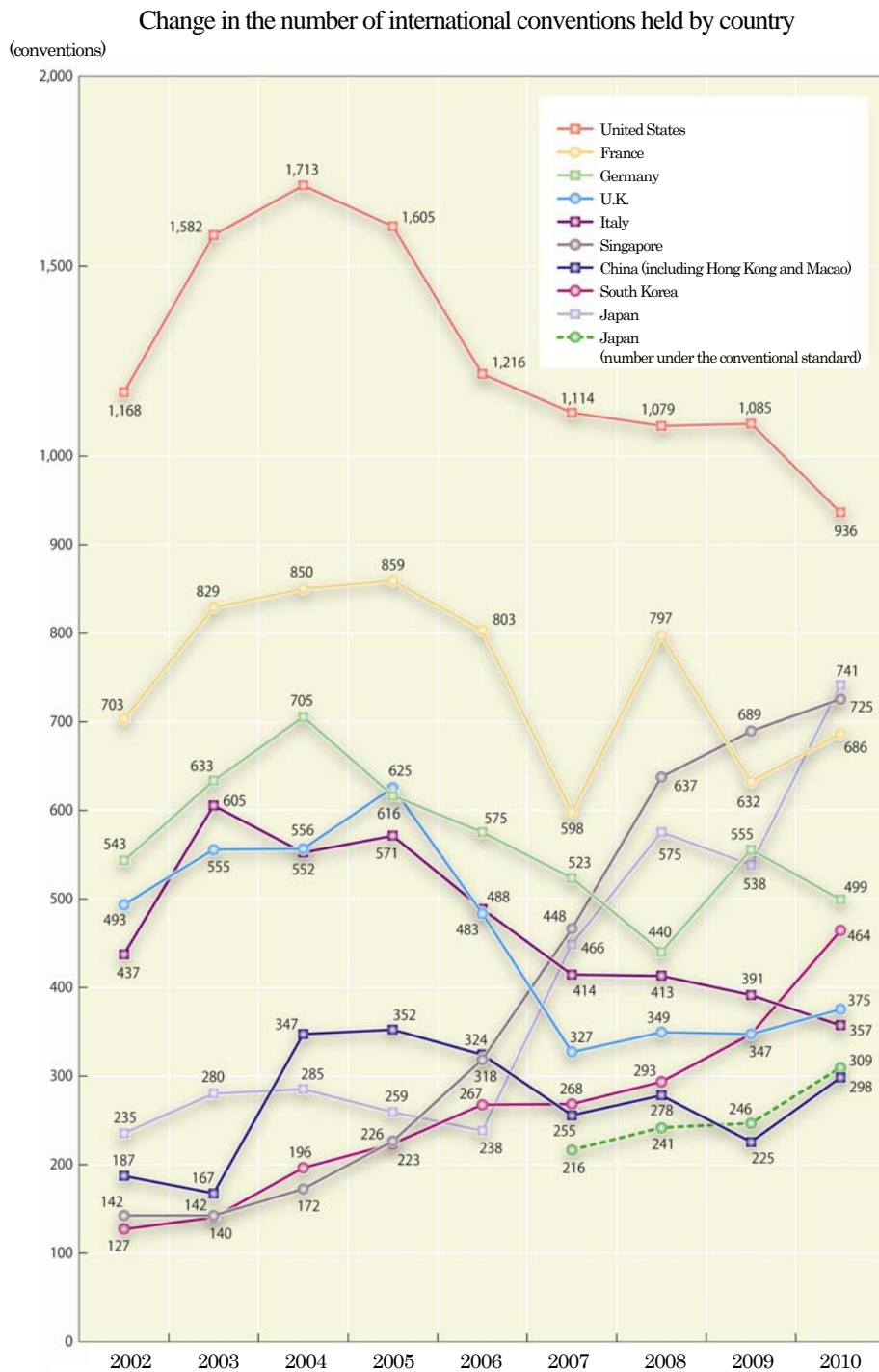
(Notes) 1. Inner circle: Totals by continent, Outer circle: Totals by country or region

2. Prepared by the Japan Tourism Agency from data provided by the Japan National Tourist Organization

2 Trends in international conventions

(1) Change in the number of international conventions held by country

In 2010, Japan hosted 741 international conventions, putting Japan in 2nd place in the world. Although the conventional statistics standards for international conventions were relaxed in 2007, the number of international conventions held in 2010 is estimated to be 309 according to the standards for target values set out in the Former Basic Plan.



(Notes) 1. Prepared by the Japan National Tourist Organization from statistics provided by the Union of International Association (UIA)

2. Values from 2007 onward are provisional.

Section 3 Economic Effects of Travel on Japan as a Whole

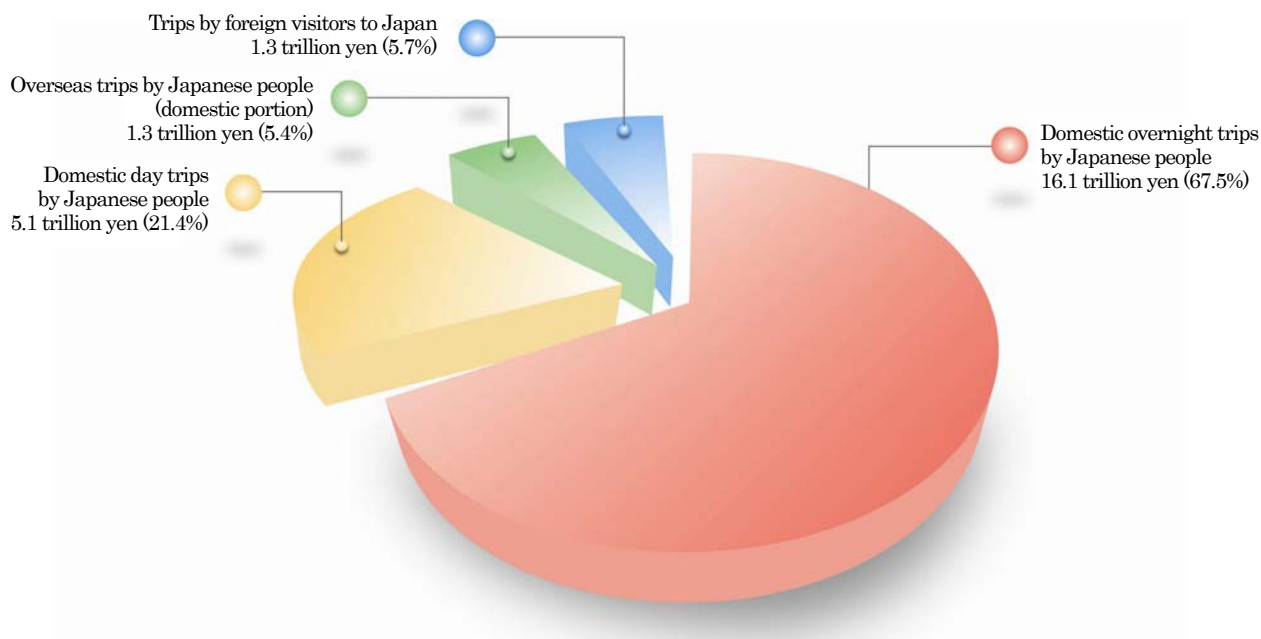
1 Economic effects in 2010

(1) Current status of travel consumption

The value of domestic travel consumption by the Japanese public in 2010 was 16.1 trillion yen for overnight trips (a decrease of 7.4% from the previous year) and 5.1 trillion yen for day trips (a decrease of 8.3% from the previous year). The value of domestic travel consumption associated with Japanese travelers going overseas was 1.3 trillion yen (an increase of 1.9% from the previous year), and the value of domestic travel consumption by foreign visitors to Japan was 1.3 trillion yen (an increase of 15.0% from the previous year).

The total value of domestic travel consumption in Japan was 23.8 trillion yen (a decrease of 6.1% from the previous year).

Market breakdown of domestic travel consumption of 23.8 trillion yen (2010)



(Note) Based on "Travel and Tourism Consumption Trend Survey" by the Japan Tourism Agency

(2) Economic effects of travel on Japan as a whole

The direct economic effects on the Japanese economy of domestic travel consumption in 2010 are estimated as an added value effect of 11.5 trillion yen and an employment effect of 2.29 million workers.

In addition, the economic effects of domestic travel consumption including indirect effects are estimated as a production ripple effect of 49.4 trillion yen (5.5% of the value of domestic production), an added value effect of 25.2 trillion yen (5.2% of gross domestic product (nominal GDP)), an employment effect of 4.24 million workers (6.6% of the total number of workers), and a tax effect of 4.0 trillion yen (5.3% of total tax revenue).

(3) Economic effects of travel on Japanese industries

It is clear that travel consumption in Japan has a large ripple effect not only on industries directly related to tourism but also on various other industries such as the foodstuffs industry, the retail industry, and the agriculture, forestry, and fishery industry.

Economic effects by industry (2010)



Notes: 1. Based on "Travel and Tourism Consumption Trend Survey" by the Japan Tourism Agency

2. The production ripple effect indicates the extent of the effect that any new demand has on the industry as a whole (including new production throughout the entire industry generated by, for example, an increase in sales by companies providing raw materials (intermediate goods) to the travel and tourism industry and in salaries to employees working for those companies as a result of travel and tourism consumption).

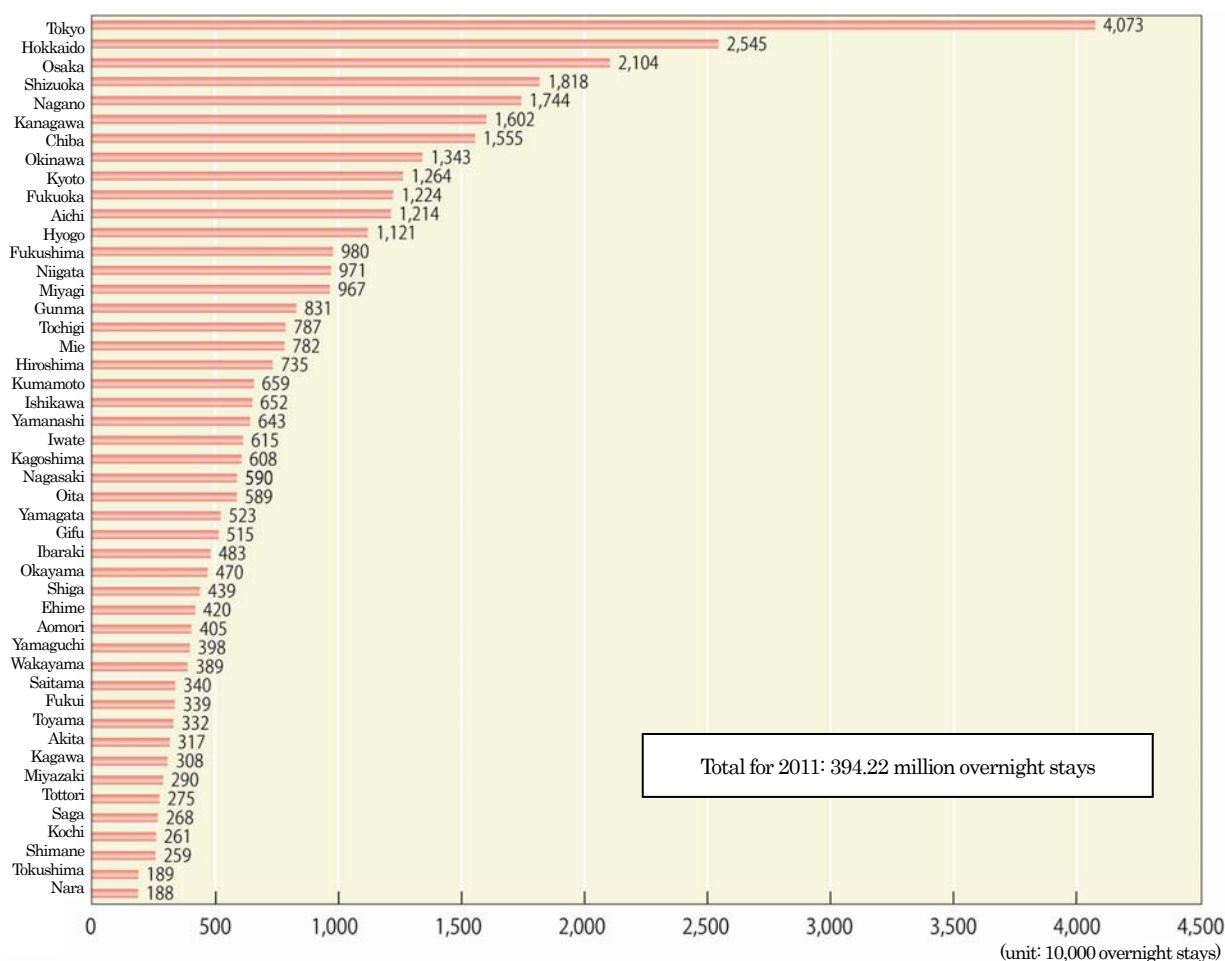
Section 4 State of Tourism in Prefectures According to the Statistics on Overnight Travel

1 Current status of the number of overnight stays

(1) Total number of overnight stays by prefecture

The total number of overnight stays by prefecture in 2011 was 394.22 million. By prefecture, Tokyo was in 1st place with 40.73 million (10.3%), Hokkaido was in 2nd place with 25.45 million (6.5%), Osaka in 3rd place with 21.04 million (5.3%), Shizuoka in 4th place with 18.18 million (4.6%), and Nagano in 5th place with 17.44 million (4.4%). These top five prefectures account for 31.1% of the total.

Total number of overnight stays by prefecture (2011)



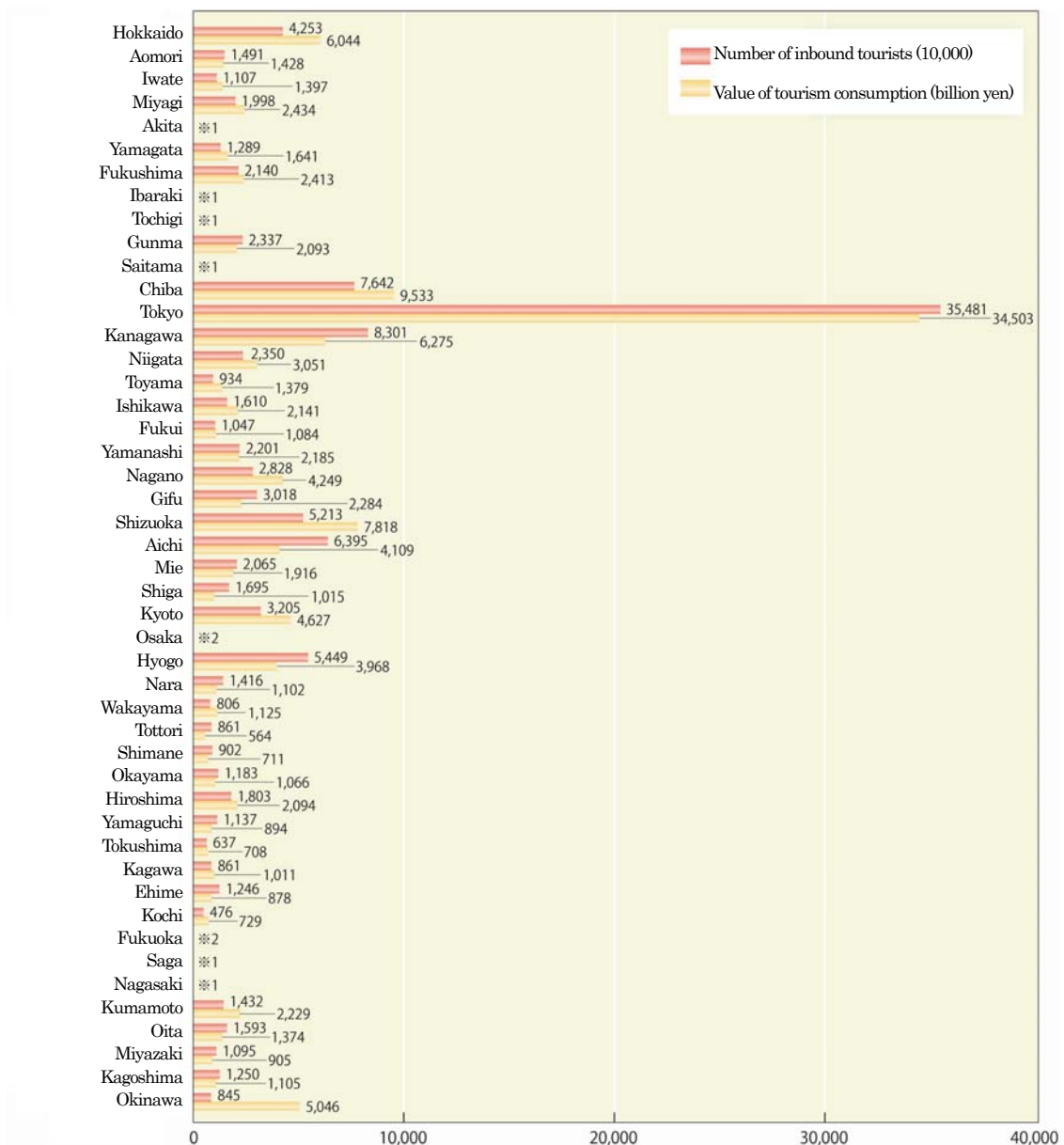
(Notes) 1. Based on “Statistics on Overnight Travel” by the Japan Tourism Agency

2. The values do not reflect data for lodging facilities that were newly built or closed during the year so the final figures may differ slightly.

Section 5 Common Standards for Inbound Tourist Statistics

To put together statistics on inbound tourists by prefecture according to common standards, the “Common Standards for Inbound Tourist Statistics” were formulated. Since April 2010, all prefectures have one by one been introducing these standards for tabulating statistics on inbound tourists (as of March 2012, these standards had been introduced in 45 prefectures excluding Osaka and Fukuoka). Introduction of these standards has made it possible to compare inbound tourist statistics for each prefecture.

Actual inbound tourist numbers and value of tourism consumption by prefecture (April to December 2010)



- (Notes) 1. Prepared by the Japan Tourism Agency based on each prefecture's "statistics on inbound tourists based on the common standard for statistics on inbound tourists"
2. Calculated from the sum of Japanese guests (tourists and business travelers) and foreigners
- *1 Saga prefecture adopted the common standard in October 2010, and Akita, Ibaraki, Tochigi, Saitama, and Nagasaki prefectures adopted it in January 2011, so figures for April to December 2010 cannot be calculated.
- *2 Osaka and Fukuoka have not yet adopted the common standard.

Section 6 Trends in World Tourism

According to estimates by the United Nations World Tourism Organization (UNWTO), the total number of foreign tourists accepted by all countries in 2010 was 939.86 million (an increase of 6.6% from the previous year), and the total revenue of international travel of all countries was US\$919 billion (an increase of 8.0% from the previous year).

Chapter 2 Creating Attractive, Internationally Competitive Tourist Destinations

Section 1 Creating Attractive, Internationally Competitive Tourist Destinations

- 1 By FY2011, the “Tourism Spheres Development Implementation Plan” had been accredited for 48 regions in order to promote the formation of tourism areas that encourage tourism involving at least two overnight stays through the collaboration of a wide range of tourism-related parties in local areas.
- 2 Treasury loans and special tax exemption measures have been made available for the development of hotels and inns. Support has been provided for a wide range of projects, both “hard” and “soft”, to promote urban development.

Section 2 Creating Attractive Tourist Destinations that Draw on Local Characteristics by Using Tourism Resources

- 1 We are working to protect Japan’s cultural heritage and the world’s cultural heritage. Hiraizumi was inscribed on the World Heritage List in June 2011.
- 2 We are promoting measures to protect, nurture and develop tourism resources connected with historical features such as the conservation of historical features and the development of national parks.
- 3 We strive to protect, nurture and develop tourism resources related to natural scenic beauty such as the national and quasi-national parks, the world natural heritage areas and other places of outstanding natural beauty. The Bonin Islands were added to the list of World Natural Heritage sites in June 2011.
- 4 We strive to protect, nurture and develop tourism resources related to natural beauty by supporting activities aimed at preserving and utilizing visually significant buildings and trees based on the “Landscape Act”.
- 5 We have taken steps to protect, nurture and develop tourism resources related to hot springs and other cultural activities/industries, etc.

Section 3 Comprehensively Developing Transport Facilities Necessary to Promote Visits by Tourists

- 1 We promoted the development of international transport facilities such as airports and sea ports.
- 2 We endeavored to improve access to airports and sea ports.
- 3 We promoted the development of Shinkansen high-speed railways and expressways.
- 4 We promoted the development of facilities related with regional transport such as railways and roads.

Chapter 3 Strengthening the International Competitiveness of the Tourism Industry and Developing Human Resources to Contribute to the Promotion of Tourism

Section 1 Strengthening the International Competitiveness of the Tourism Industry

To revitalize the tourism industry that was severely affected by the Great East Japan Earthquake, we supported disaster-affected areas by dispatching experts to those areas.

Section 2 Developing Human Resources to Contribute to the Promotion of Tourism

- 1 We formulated a curriculum model that incorporates management strategies, marketing and accounting. We also held “Tourism Nation Promotion Roundtable” talks centered on the theme of “nurturing human resources” in the tourism industry.
- 2 To enhance regional efforts for developing human resources, we investigated and formulated “Guidelines for human resource development for the formation of tourist destinations”, which are guidelines for nurturing human resources in regional areas.
- 3 We are supporting efforts such as the “Tourism and City Creation Education National Convention” which is

jointly held by educators and tourism-related groups to promote the spread of tourism education, and we promote “tourism nation education”.

Chapter 4 Promoting International Tourism

Section 1 Encouraging Visits by Foreign Tourists

- 1 As part of the Visit Japan project in FY2011, we carried out a PR campaign using various advertising media. For example, in the South Korean market, we promoted new travel routes to Japan known as J-Routes that are designed to meet various traveler needs.
- 2 We provided information in foreign languages via public transport operators based on the “Plan for promoting the provision of information.”
- 3 In preparation for the 12th WTTC Global Summit (April 2012), the relevant ministries and agencies worked together to disseminate information about the conference and increase the number of participants.
- 4 We are striving to make visa issuing procedures and immigration procedures faster and smoother. We have also established tourist offices for foreign travelers, improved the interpreting guide system, and promoted the popularization of goodwill guides (volunteer guides).

Section 2 Promoting Global Interchange

- 1 The 6th China-Japan-Korea Tourism Ministerial Meeting was held in South Korea in May 2011. In July 2011, a multiple entry visa for individual Chinese tourists visiting Okinawa was introduced.
- 2 We cooperated with the Visit World Campaign implemented chiefly by JATA.
- 3 We held discussions and opinion meetings with foreign school officials and travel companies in order to attract educational trips to Japan.

Chapter 5 Improving the Environment for Encouraging Tourist Travel

Section 1 Making Tourist Travel Easier and Smoother

- 1 The average number of annual paid vacation days granted per worker over one year in 2010 was 17.9, and the number of those days used per worker was 8.6, giving a usage rate of 48.1%.
- 2 We are promoting vacation reform that includes efforts to encourage workers to use vacation days so that each worker can reconsider the balance between work and vacations in order to create a more enriched lifestyle.
- 3 We will continue to look into full-scale implementation of “decentralized vacation taking” that aims to disperse major vacations by region, especially considering the impacts on people’s lives and economic activities after the earthquake and the national consensus.
- 4 In addition to looking into reviewing standard travel industry agreements, we are engaged in efforts to protect consumers by maintaining the fairness of travel transactions and securing the safety of travelers with the aim of ensuring the proper operation of travel business.
- 5 We have made efforts to promote the public understanding of the significance of tourism through the JATA Tourism Forum & Travel Showcase 2011.
- 6 We started a joint public-private domestic travel promotion campaign that used a united logo and catchphrase (“Let’s make our best Japan”) in order to lift the demand for domestic travel, which plummeted after the Great East Japan Earthquake.

Section 2 Improving Hospitality Towards Tourists

- 1 We implemented multi-language support between transport bases and destinations using various measures including digital signboards and other signs, on-board announcements, and numbering of bus stops so that foreign tourists do not have any trouble in terms of language.
- 2 We held the “Charming Japanese Souvenir Contest 2011” in January 2012 with the aim of conveying the appeal of Japan to foreign countries through our souvenirs and entice foreigners to visit Japan.

Section 3 Enhancing Convenience for Tourists

- 1 We strived to make travel-related facilities barrier-free so that the elderly, disabled, foreigners and other tourists who require special consideration may use them smoothly. Such facilities include public transportation, walkways, rivers and urban parks.
- 2 We provide the “Online Land Web System” that makes tourism-related geospatial information available for anyone to browse.

Section 4 Ensuring the Safety of Tourist Travel

- 1 In addition to providing meteorological and other information to travelers, we promoted the provision of information on the situation regarding accidents and disasters etc. in tourist destinations both in Japan and abroad by, for example, providing detailed information about disaster-prone areas, evacuation sites and evacuation routes etc.
- 2 We addressed issues such as preventing the occurrence of accidents during tourist travel, including safety measures for public transport, road/marine transport and lodging facilities, and the response to and safety measures for accidents or incidents overseas.
- 3 We promoted the development of erosion control facilities to prevent landslides and the development of ICT-based information infrastructure in tourist destinations where landslides are likely to occur.

Section 5 Opening Up New Fields of Tourist Travel

- 1 In order to promote new tourism, we clarified the actual effectiveness of travel products that rely on the attraction of a region’s tourism resources and we investigated ways of improving quality in order to heighten customer satisfaction with the travel products.
- 2 In June 2011, we formulated the “Sports Tourism Promotion Basic Policy.” This policy indicated the direction that promotion of sports tourism will take.

Section 6 Conserving Environments and Scenic Views in Tourist Destinations

- 1 We improved the environments in tourist destinations by improving the environment in coastal waters and strengthening measures for domestic effluent and the monitoring system for preventing the illegal dumping of waste.
- 2 In addition to preserving environments in tourist destinations, we are striving to protect scenic landscapes in tourist destinations by, for example, promoting the application of the Landscape Act, spreading and publicizing its basic principles, enhancing systems related to outdoor advertising in tourist destinations, and supporting town development that harnesses history, culture and local features.

Section 7 Developing Statistics on Tourism

We strived to speed up publication of various tourism-related statistics. In addition, with the aim of conducting a

full-scale regional tourism economic survey in FY2012 for clarifying the basic structure of tourism-related industries (number of businesses, sales volume, employment and working conditions, etc.) and the effects that tourism has on regional economies, we conducted a preliminary investigation in 58 tourist areas in 36 prefectures to verify the research methodology.

Tourism Policy in FY2012

Chapter 1 Creating Attractive Tourist Destinations That Appeal to Domestic and International Tourists

Section 1 Formulating Brands for Tourism Areas

In order to promote the type of tourism that includes overnight stays, we will promote the formulation of a strategic plan that clarifies the concept of creating cornerstone tourism areas (concept), the main target group (target), and the position within the local region (positioning).

Section 2 Creating an Environment for Accepting Foreign Tourists

As well as promoting tourism by foreign visitors to Japan, we will strive to improve the community's acceptance of tourism in order to enhance tourists' satisfaction and the number of repeat visitors.

Section 3 Promoting Tourism in Large Cities

We will further promote efforts such as utilizing the tourism resources that are only found in large cities, establishing tourist routes, creating an environment that is welcoming to foreign visitors, and conducting aggressive promotional activities.

Section 4 Linking Several Regions Over a Wide Area

We will create tour routes characterized by a certain theme extending between multiple tourist areas and strengthen links between those areas.

Section 5 Advanced Efforts as the Model for Creating New Tourist Areas

We will promote strategic efforts that utilize the ingenuity of a region to serve as the new model for creating an attractive tourist region, and we will expand efforts to form a new tourist area centered around that region to all areas of the nation.

Section 6 Nurturing Human Resources in the Field of Tourism

To ensure that tourism companies can secure capable human resources in the field of tourism, we will give students an overall view of tourism and heighten their interest in and desire to work in the tourism industry by dispatching students to several companies as an internship.

Chapter 2 Implementing All Japan Comprehensive Promotions Encouraging Foreigners to Visit Japan

Section 1 Conducting More Sophisticated Promotions

- 1 To enable the earliest possible recovery in demand, which plummeted following the earthquake, we will implement thorough damage control measures such as disseminating accurate information and approaching overseas travel companies and media.
- 2 We will thoroughly separate the functions of the Japan Tourism Agency and the Japan National Tourist Organization.

Chapter 3 Strengthening the International Competitiveness of MICE Domains Such as International Conferences Etc.

Section 1 Making the MICE Marketing Strategy More Sophisticated

We will consider restructuring the MICE marketing strategy with local governments leading the push to attract conferences.

Section 2 Strengthening the Competitiveness of the MICE Industry

We will strive to nurture professionals who are world-standard in the MICE field.

Section 3 Creating an Environment that Welcomes MICE

The relevant ministries, local governments and related institutions will strive to work together to create supportive facilities.

Chapter 4 Promoting Vacation Reform

We will promote vacation reform by promoting the use of vacation time so that each worker can review the balance between work and vacations in order to create a more enriched lifestyle.

Chapter 5 Forming Attractive, Internationally Competitive Tourist Destinations

Section 1 Forming Attractive, Internationally Competitive Tourist Destinations

- 1 We will work towards the earliest possible implementation of plans based on the results of our investigations in FY2011 to form a travel industry in which it is easy for tour operators to create and market landing-type travel products.
- 2 The relevant ministries and agencies will work together to consider tourism promotion and tourism exchange when maintaining social capital including developing urban areas and maintaining streetscapes, maintaining roads, and conserving and utilizing rivers, which all contribute to the promotion of tourism.

Section 2 Forming Attractive Tourist Destinations That Harness the Characteristics of a Region by Making Use of Tourism Resources

- 1 We will implement the “Project to Strengthen World Heritage Strategy” which aims to strengthen Japan’s strategy regarding World Heritage policy.
- 2 As well as grasping the current situation regarding the maintenance and management of ancient capitals such as Kamakura, we will consider expanding the maintenance and management policies and promote the preservation of historical landscapes in ancient capitals worthy of world heritage listing in order to enhance the attractiveness of those ancient capitals.
- 3 We will promote the development and conservation of forests that are appropriate to the natural landscape amid the forests that occupy more than 90% of the assets of Mount Fuji, which is a candidate world heritage site.
- 4 We will endeavor to disseminate information targeting wealthy foreigners, promote sports tourism, advance regional tourism centered on marine leisure activities, promote environmental learning and natural experience activities, and support the utilization of resources in rural communities.

Section 3 Comprehensively Developing Transport Facilities Necessary to Promote Visits by Tourists

- 1 We will develop facilities and expand the number of arrival and departure slots at Haneda Airport and Narita International Airport. We will also strengthen the system for accepting LCCs and business jets.
- 2 We will develop airports and expressways etc.

- 3 We will promote public transport usage by promoting the use of station forecourts, and we will enhance facilities at passenger boat terminals. We will also promote the creation of beautiful harbor spaces through the development of port facilities and port oases.

Chapter 6 Strengthening the International Competitiveness of the Tourism Industry and Developing Human Resources to Contribute to the Promotion of Tourism

Section 1 Strengthening the International Competitiveness of the Tourism Industry

- 1 From the viewpoints of strengthening the international competitiveness of the tourism industry and helping to create tourist destinations, we will review the ideal state of the tourism industry in the medium to long term.
- 2 We will promote the widespread adoption of the guidelines for human resource development for the formation of tourist destinations and methods for human resource development.

Chapter 7 Promoting International Tourism

Section 1 Encouraging Visits by Foreign Tourists

- 1 As a national strategy, we will further expand and strengthen the Japan brand overseas and advertise Japan's strengths, its appeal and its Japanese "value."
- 2 We will strengthen the ability of the Japan National Tourist Organization's overseas offices to provide information to people related with international MICE.
- 3 We will strive to make visa issuing procedures and immigration procedures faster and smoother. We will enhance the quality and quantity of interpreter guides, promote OpenSky, and create an environment in which foreign visitors can tour through rural villages without any inconvenience.

Section 2 Promoting Global Interchange

- 1 We will strive to expand tourism exchanges on the occasion of the 40th anniversary of the normalization of diplomatic relations between China and Japan, the 100th anniversary Japan-U.S. Cherry Blossom Centennial, and the 60th anniversary of diplomatic relations between Japan and India.
- 2 We will promote public-private efforts and stimulate demand for overseas travel through the dispatch of public-private missions, skillful use of business anniversaries, and promotional measures that effectively use links with the business community.
- 3 We will strive to once again attract exchange students to Japan by transmitting accurate information about the current situation in Japan via the comments of exchange students who have continued to study here after the earthquake.

Chapter 8 Improving the Environment for Encouraging Tourist Travel

Section 1 Making Tourist Travel Easier and Smoother

We will look into and promote efforts that support various traveler needs, including simplifying and streamlining services and providing added value regardless of cost.

Section 2 Improving Hospitality Towards Tourists

We will support efforts to attract both local and international tourists using regional resources in rural areas.

Section 3 Enhancing Convenience for Tourists

We will improve the environment by making road transportation smoother and improving road signage.

Section 4 Ensuring the Safety of Tourist Travel

- 1 We will strive to improve tsunami warnings by promptly ascertaining the scale of major earthquakes and reviewing the details of tsunami warnings and the way in which they are conveyed.
- 2 We will promote the “Zero Accident Plan (Prioritized Operation for Eliminating Accident-Prone Road Sections)” for improving transport safety facilities on general roads and promoting the eradication of intense and focused traffic accidents on major roads.

Section 5 Opening Up New Fields of Tourist Travel

- 1 We will consider policies for promoting voluntary efforts to enhance customer satisfaction of travel products that were put together to take advantage of certain features of regional tourism developed in specific areas.
- 2 We will promote eco-tourism, green tourism, and new tourism that features tourism resources such as fashion, food, cinema, animation, forests, and flowers etc.
- 3 We will promote tourism targeting the younger generation or those in medical care. Furthermore, we will to promote the development and marketing of travel products aimed at enhancing the appeal of ferries and casual boat trips to isolated islands.

Section 6 Protecting Environments and Scenic Views in Tourist Destinations

- 1 We will protect national and quasi national parks, and also ensure the proper conservation and management of World Heritage Sites.
- 2 We will tackle issues such as promoting the repair and utilization of tradesmen’s houses and other historic buildings by securing private funds to create beautiful landscapes and historic streetscapes, and therefore also the training of professional organizations that will be engaged to create historic streetscapes across a wide area.

Section 7 Establishing Statistics on Tourism (Promoting the Tabulation and Utilization of Tourism-related Statistics)

In FY2012, we plan to conduct a full-scale investigation of about 160,000 businesses nationwide in conjunction with the economic census as an economic survey of tourist areas to clarify the impact that tourism has on regional economies.