

White Paper on Tourism in Japan

The Tourism Situation in FY2013

Table of Contents

Chapter 1 The Global Tourism Trend

Section 1 The Global Macroeconomic Overview	1
Section 2 The Global Tourism Situation in FY2013	2

Chapter 2 The Japan's Tourism Trend 10

Section 1 The Situation in Travel to Japan	10
1 The Situation in Travel to Japan	10
2 Situation of International Conventions	14
(1) Situation of conventions held worldwide and by region	14
(2) Situations of conferences held in Asian major countries and Japan	15
Section 2 Verification of Factors of Achieving 10 Million Foreign Visitors	17
1 Changes in the economic conditions surrounding Japan	18
2 Visit Japan Promotion in cooperation with the public and private sectors	21
3 Relaxation of visa requirements	22
4 Enhancement of airline network	25
Section 3 The Foreign Travel Situation	27
Section 4 The Domestic Travel Situation	28
Section 5 Situation of Recovery from the Great East Japan Earthquake	31
Section 6 The Tourism Situation in Regional Areas	32
1 Hokkaido	34
2 Tohoku	34
3 Kanto	34
4 Hokuriku - Shin'etsu	34
5 Chubu	34
6 Kinki	34
7 Chugoku	34
8 Shikoku	35
9 Kyushu	35
10 Okinawa	35
Section 7 Tourism Promotion in Regional Areas	36
1 Hokkaido	36
2 Tohoku	36
3 Kanto	37
4 Hokuriku - Shin'etsu	37
5 Chubu	38
6 Kinki	38
7 Chugoku / Shikoku	39
8 Kyushu	39
9 Okinawa	40

Regarding recent global economy, there was a drastic economic downturn during the period from 2007 to 2009, with the impacts from the subprime loan problem and the Lehman Shock; however, many regions have been on a recovery trend since then. Nevertheless, the recovery trends after the recession differs by region as follows. According to the International Monetary Fund (IMF), for the three years immediately prior to the occurrence of the Lehman Shock in the United States, the real economic growth rate had been between 1.8% to 3.4%, but had showed negative growth trends continuously from 2008 to 2009.

The situation improved to 2.5% in 2010 and had remained between 1.8% to 2.8% since then. As for the European Union (EU), the sovereign debt crisis arose in Europe beginning with Greece in 2009, a year after the Lehman Shock, and the real economic growth fell to -4.4%. Although the growth improved to 2.0% in 2010, and recorded 1.6% in 2011, decline to -0.7% was observed again in 2012 and an unstable situation continues.

On the other hand, while impact of the Lehman Shock is observed, a relatively high economic growth continues in emerging countries. In China, for the five years from 2003 to 2007, growth of over 10% has been achieved every year, and especially in 2007, growth recorded 14.2%. Although growth momentum decelerated after the Lehman Shock, it remains between 7.7% and 10.4%.

As for the six major countries (Indonesia, Malaysia, Philippines, Singapore, Thailand and Vietnam) of the Association of South-East Asian Nations (ASEAN), the average real economic growth rate of six countries fell to 1.1%, however, it has remained between 4.5% and 8.4% since 2010.

In other emerging countries such as Latin America and the Caribbean, the real economic growth rate showed a negative growth of -1.3% in 2009 but recovered to 6.0% in 2010, which exceeded 5.8% in 2007 before the Lehman Shock. Subsequently, growth slowed down slightly to 3.1% in 2012.

Decline was small in Middle East and North Africa, having 3.0% even during the largest recession in 2009, however, growth remained between 3.9% and 5.5%. Real economic growth in Sub-Saharan Africa fell to 2.6% in 2009 but had been between 4.9% and 5.6% since then. (Fig. I-1)

Fig I-1 Change in Real Economic Growth Rate of Major Countries and Regions

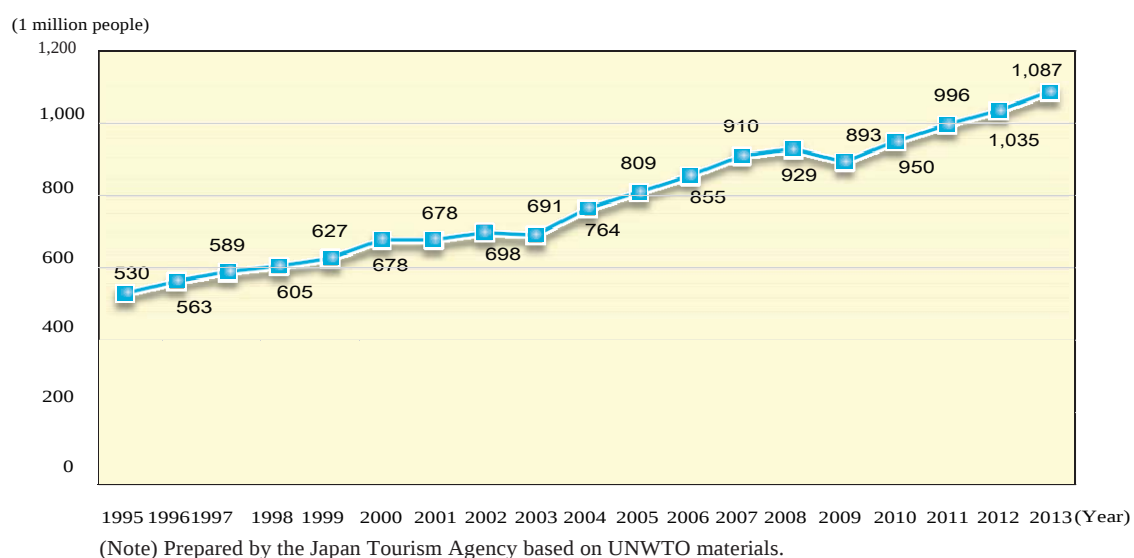
	2005	2006	2007	2008	2009	2010	2011	2012
United States	3.4	2.7	1.8	-0.3	-2.8	2.5	1.8	2.8
EU	1.7	3.3	3.0	0.4	-4.4	2.0	1.6	-0.7
China	11.3	12.7	14.2	9.6	9.2	10.4	9.3	7.7
ASEAN (average of six countries)	5.8	6.2	6.7	4.1	1.1	8.4	4.5	5.3
Latin America and the Caribbean	4.6	5.6	5.8	4.3	-1.3	6.0	4.6	3.1
Middle East and North Africa	5.6	6.8	6.0	5.1	3.0	5.5	3.9	4.1
Sub-Saharan Africa	6.2	6.3	7.1	5.7	2.6	5.6	5.5	4.9

(Note) Prepared by the JTA based on International Monetary Fund (IMF) materials.

Section 2 The Global Tourism Situation in FY2013

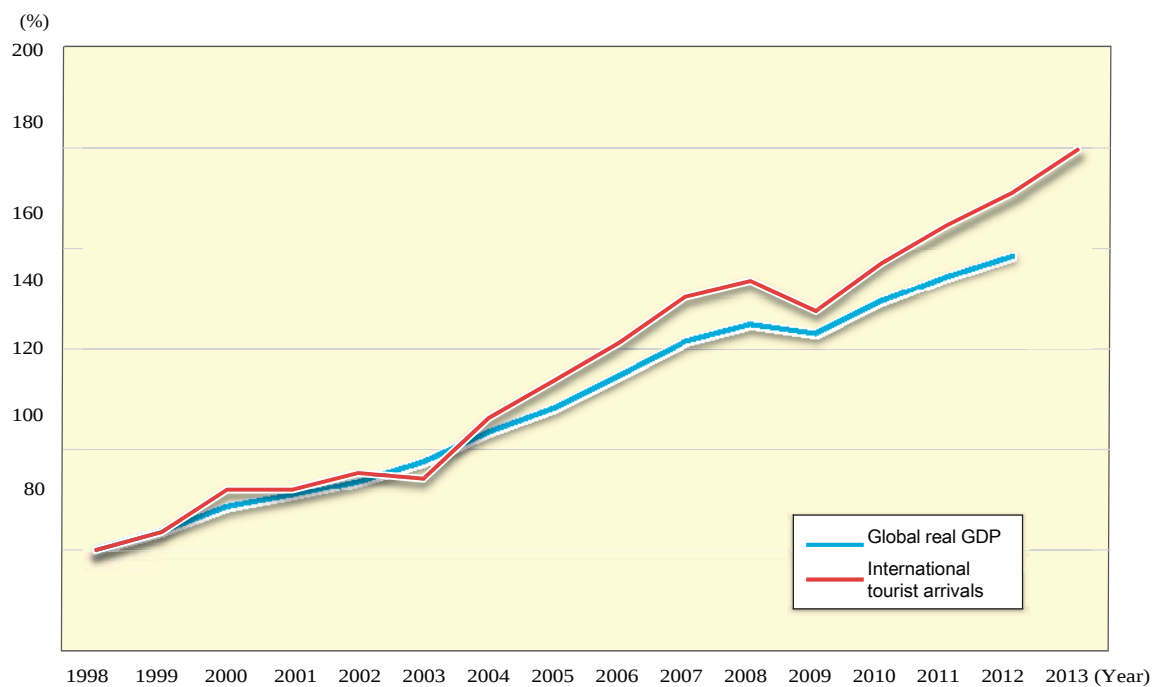
According to announcement made by the United Nations World Tourism Organization (UNWTO) in January 2014, international tourist arrivals grew by 5% in 2013 which recorded 1.87 billion. (Fig. I-2)

Fig I-2 Change in International Tourist Arrivals



The increasing trends of international tourist arrivals and the global real GDP are equivalent, with international tourist arrivals slightly exceeding. (Fig.I-3)

Fig.I-3 Changes in International Tourist Arrivals and Real Global GDP



(Note)

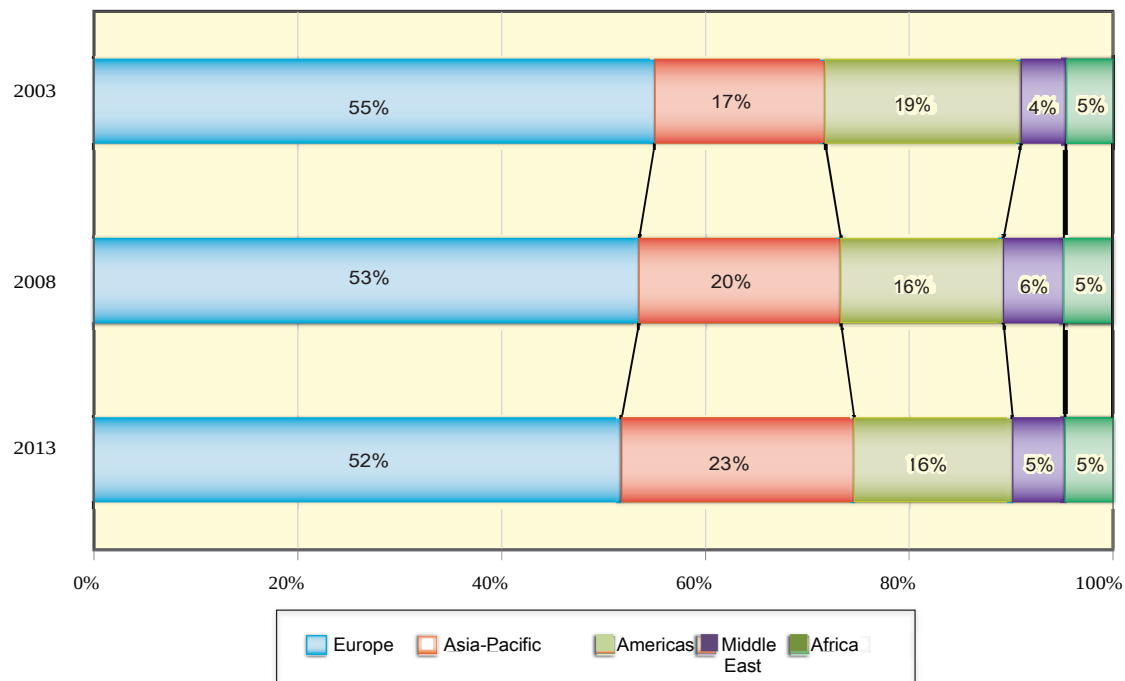
1 Compiled by the JTA based on UNWTO and IMF materials.

2 1998 indexed as 100.

3 real Global GDP up to 2012.

Regarding the regional share of international tourists, Europe accounts for more than half of the tourists accepted but is declining gradually. The share was 19% in 2003 for the Americas but declined to 16% in 2013. On the other hand, that for the Asia and the Pacific has been growing steadily, which expanding to 23% in 2013 from 17% in 2003, showing a remarkable increase. That for both Middle East and Africa in 2013 was around 5%. (Fig.I-4)

Fig. I-4 Regional Share of International Tourist Arrivals (2003 to 2013)



(Note) Compiled by the JTA based on UNWTO materials.

According to the aforementioned announcement made by the United Nations World Tourism Organization (UNWTO) in January 2014, the number of international tourists who visited Europe is in an increasing trend following 2011 and 2012, and was 563 million, a 29 million increase from the previous year.

International tourists who visited the Asia and the Pacific was 248 million, a 14 million increase compared to the previous year. The increase rate of 6% was the highest among all regions.

International tourists who visited the Americas was 169 million, a 6 million increase from the previous year (increase of 3.6% from the previous year).

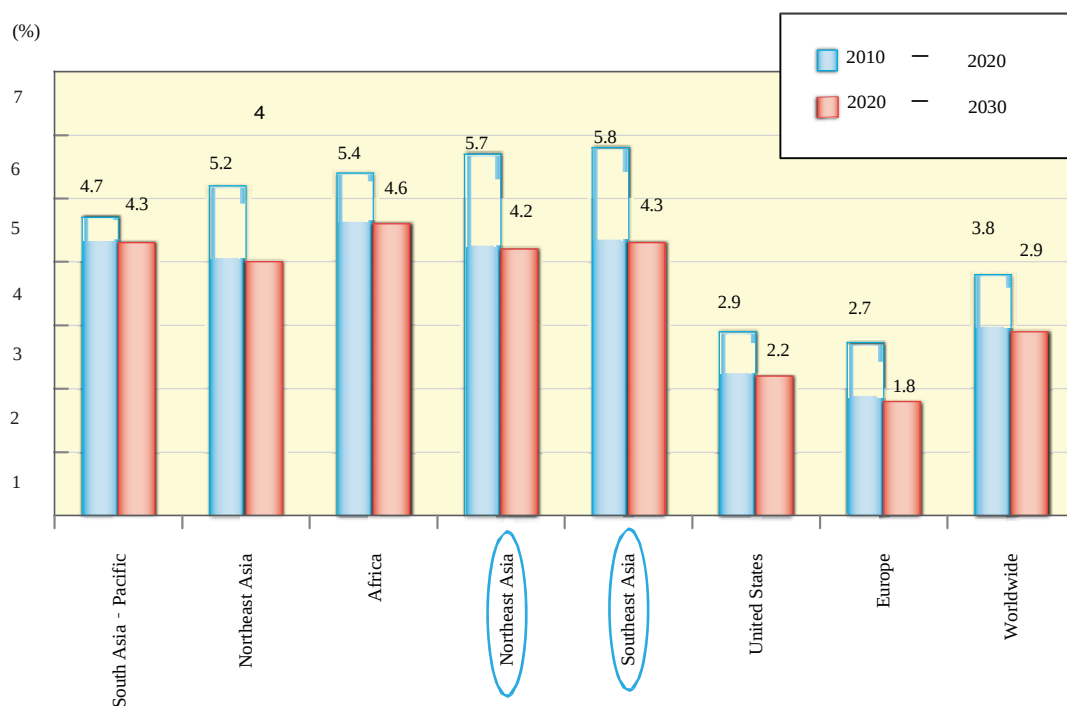
International tourists who visited Africa was 56 million, a 3 million increase from the previous year (increase of 5.6% from the previous year) . (Fig. I-5)

Fig. I-5 International Tourists by Region (2013)

	International tourist arrivals (Unit: 10,000 people)	Increase from previous year (Unit: 10,000 persons)	Change YoY
World	108,700	5,200	5. 0%
Europe	56,300	2,900	5. 4%
Asia and thePacific	24,800	1,400	6. 0%
Americas	16,900	600	3. 6%
Africa	5,600	300	5. 6%
Middle East	5,200	10	0. 3%

According to the UNWTO, the worldwide international tourists will continue to have an upward trend. As aforementioned, the Asia and the Pacific has recently shown a rapid growth, and globally, high growth in Northeast and Southeast Asia is expected to continue. (Fig. I-6)

Fig. I-6 Annual Average Percentage Change of International Tourists Arrivals

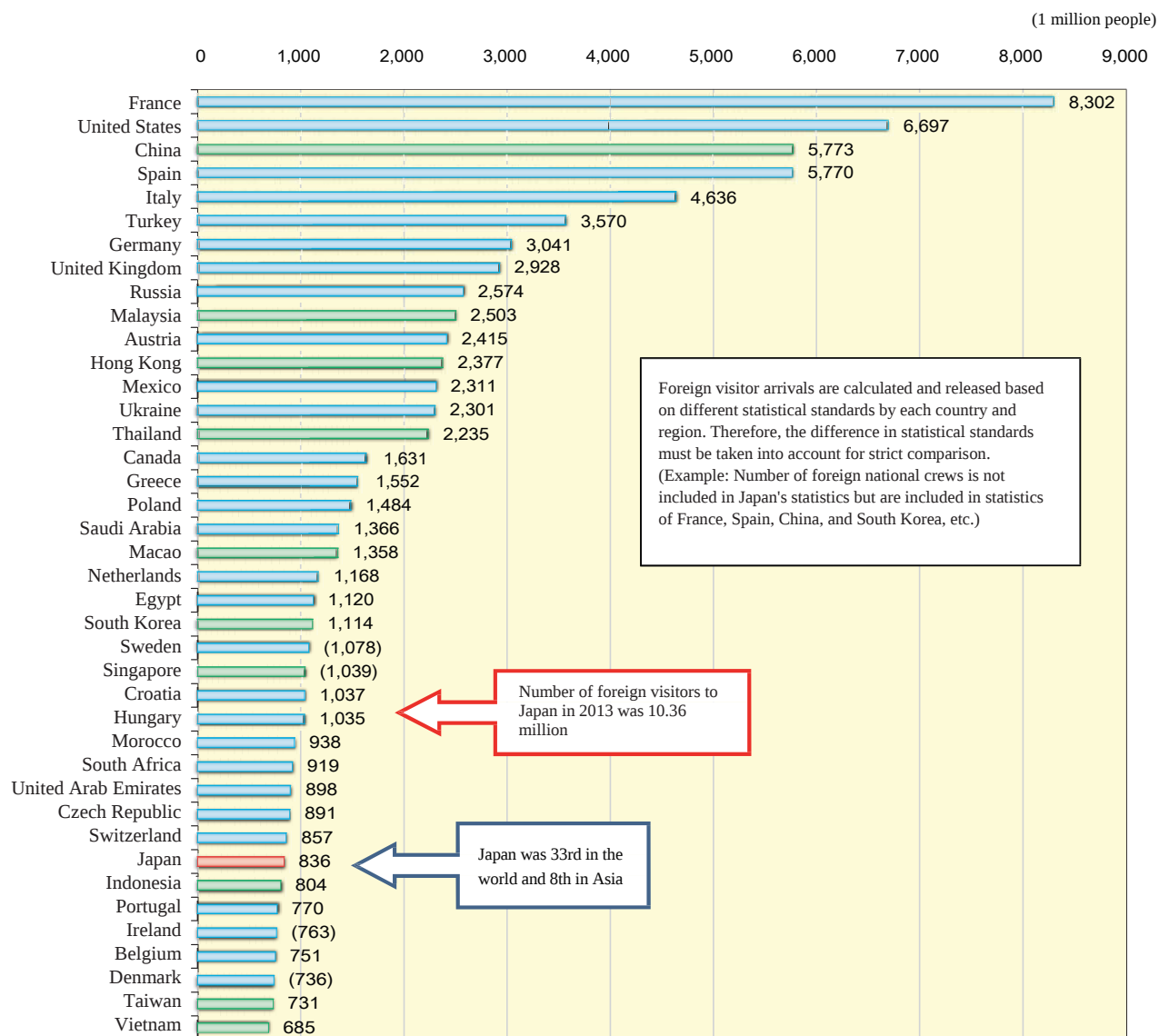


(Note) Compiled by the JTA based on UNWTO materials.

Number of foreign visitors arrivals are calculated and released based on different statistical standards by each country and region. Although the difference in statistical standards must be taken into account for strict comparison, France took the lead with 83.02 million, the United States ranked second with 66.97 million, and China ranked third with 57.73 million following the previous year for the number of foreign visitors arrivals in 2012. Number of foreign visitors to Japan increased to 8.36 million (ranked 33rd (8th in Asia) from 6.22 million (ranked 39th (10th in Asia) in 2011, the year of the great East Japan earthquake, which rose both in number and ranking. (Fig. I-7)

Foreign visitors to Japan in 2013 was 10.36 million, a year-on-year increase of 24.0%, which the same level as 27th in the ranking of number of foreign visitor arrivals in 2012.

Fig. I-7 Ranking Based on Number of Foreign Visitor Arrivals (2012)



(Note)

1 Prepared by the Japan National Tourism Organization (JNTO) based on materials from the UNWTO and each country's government tourism bureaus.

2 Number of foreign visitor arrivals are calculated and released based on different statistical standards by each country and region. Therefore, the difference in statistical

standards must be taken into account for strict comparison.

3 The values shown here are preliminary as of June 2013.

4 2011 data was used for Sweden, Singapore, Ireland, and Denmark because data for 2012 was unknown.

5 The value of Emirate of Abu Dhabi was used for the United Arab Emirates because other values are unknown.

6 Aside from South Korea, Japan, Taiwan, and Vietnam, the values used are in principle the number of foreign visitors who stayed for one night or more.

7 Order may differ because the number of foreign visitors change depending the timing of applying newly announced or retroactively updated values.

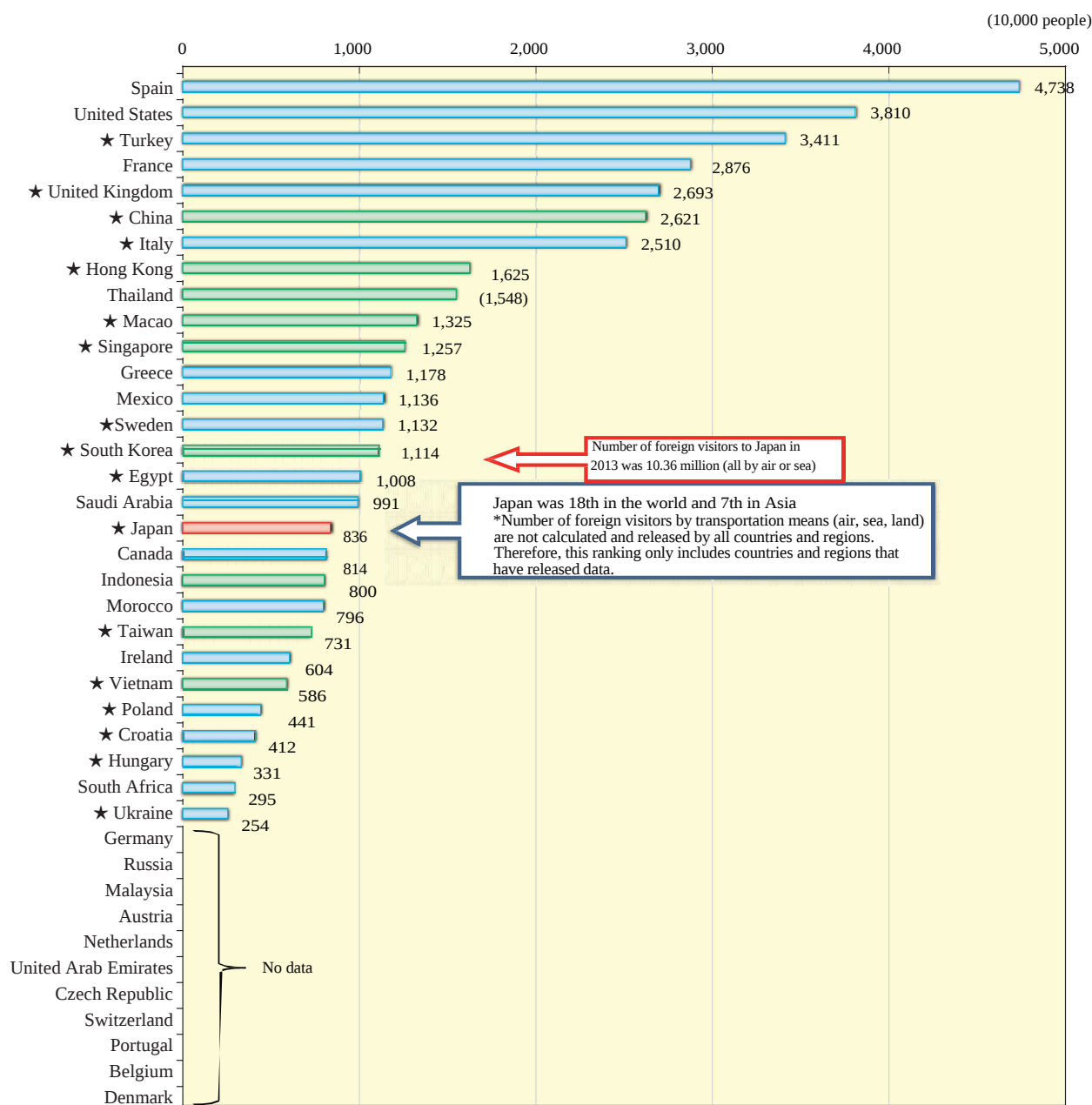
Because Japan is an island country, incoming routes from overseas is limited to air and sea. On the contrary, in Europe, many countries are connected by land and there are many inbound travelers by car. Fig. I-8 is a comparison made in equivalent conditions to Japan.

For the number of foreign visitor arrivals in 2012 by air or sea, Spain took the lead with 47.38 million, the United States ranked second with 38.10 million, and Turkey ranked third with 34.11 million. Japan ranked 18th in the world (and 7th in Asia) with 8.36 million. (Fig. I-8)

The number of foreign visitors to Japan by air or sea in 2013 was a 10.36 million, a year-on-year increase of 24.0%, which the same level as 16th in the ranking of number of foreign visitor arrivals in 2012 by air or sea.

It should be noted that countries and regions where the number of foreign visitors by air or sea are not known are not included in the ranking.

Fig. I-8 Ranking Based on Number of Foreign Visitor Arrivals by Air or Sea (2012)



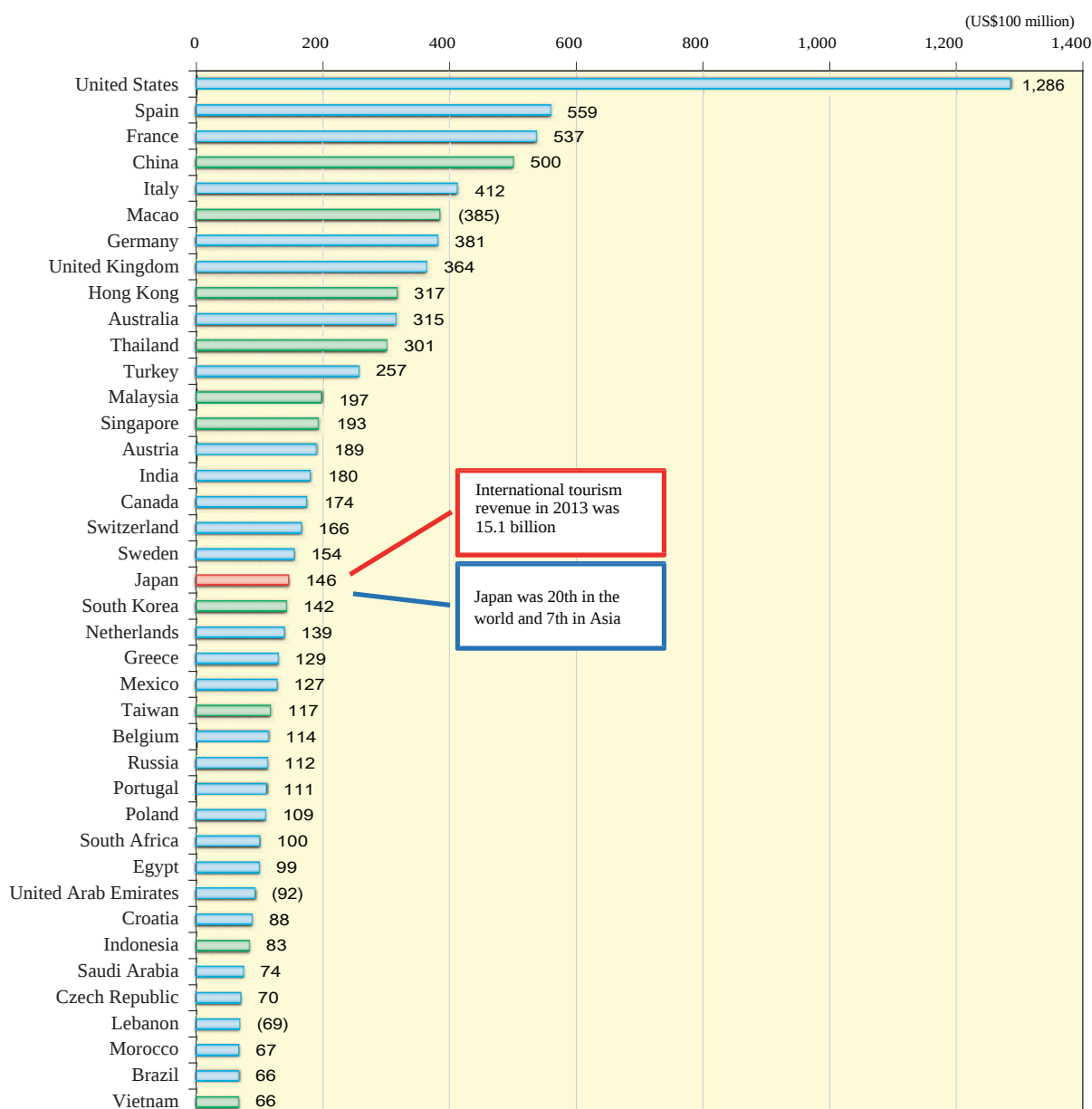
(Note)

- 1 Compiled by the JTA based on UNWTO materials.
- 2 Number of foreign visitor arrivals are calculated and released based on different statistical standards by each country and region. Therefore, the difference in statistical standards must be taken into account for strict comparison.
- 3 The values shown here are preliminary as of February 2014.
- 4 2011 data was used for Thailand because values for 2012 are unknown.
- 5 Aside from countries and regions marked with stars, the values used are in principle the number of foreign visitors who stayed for one night or more.
- 6 Values shown here are the number of foreign visitor arrivals excluding land (entry by car) from transportation means of air, sea, and land.
- 7 Number of foreign visitor arrivals by air and sea are unknown for Germany, Russia, Malaysia, Australia, Netherlands, United Arab Emirates, Czech Republic, Switzerland, Portugal, Belgium, and Denmark because data by transportation means do not exist.
- 8 Order may differ because the number of foreign visitor arrivals change depending the timing of applying newly announced or retroactively updated values.

Regarding the international tourism revenues by countries and regions in 2012, there is no change in the top ten countries and region albeit the change in order compared to that of 2011. The United States ranked top following the previous year (2011) with 128.6 billion dollars, Spain ranked second with 55.9 billion dollars, and France ranked third with 53.7 billion dollars. International tourism revenue in Japan increased to 14.6 billion dollars (ranked 20th (7th in Asia)) from 11 billion dollars (ranked 28th (10th in Asia)) in 2011, which rose both in amount and ranking. Within Asia, China retained its 2011 lead in terms of international tourism revenue.

Japan's international tourism revenue in 2013 was 15.1 billion dollars, a year-on-year increase of 3.8%, which is of the same level as 20th in the international tourism revenue ranking in 2012. (Fig. I-9)

Fig. I-9 International Tourism Revenue Ranking (2012)



(Note)

1 Prepared by the Japan National Tourism Organization (JNTO) based on materials from the UNWTO and each country's government tourism bureaus.

2 The values shown here are preliminary as of June 2013.

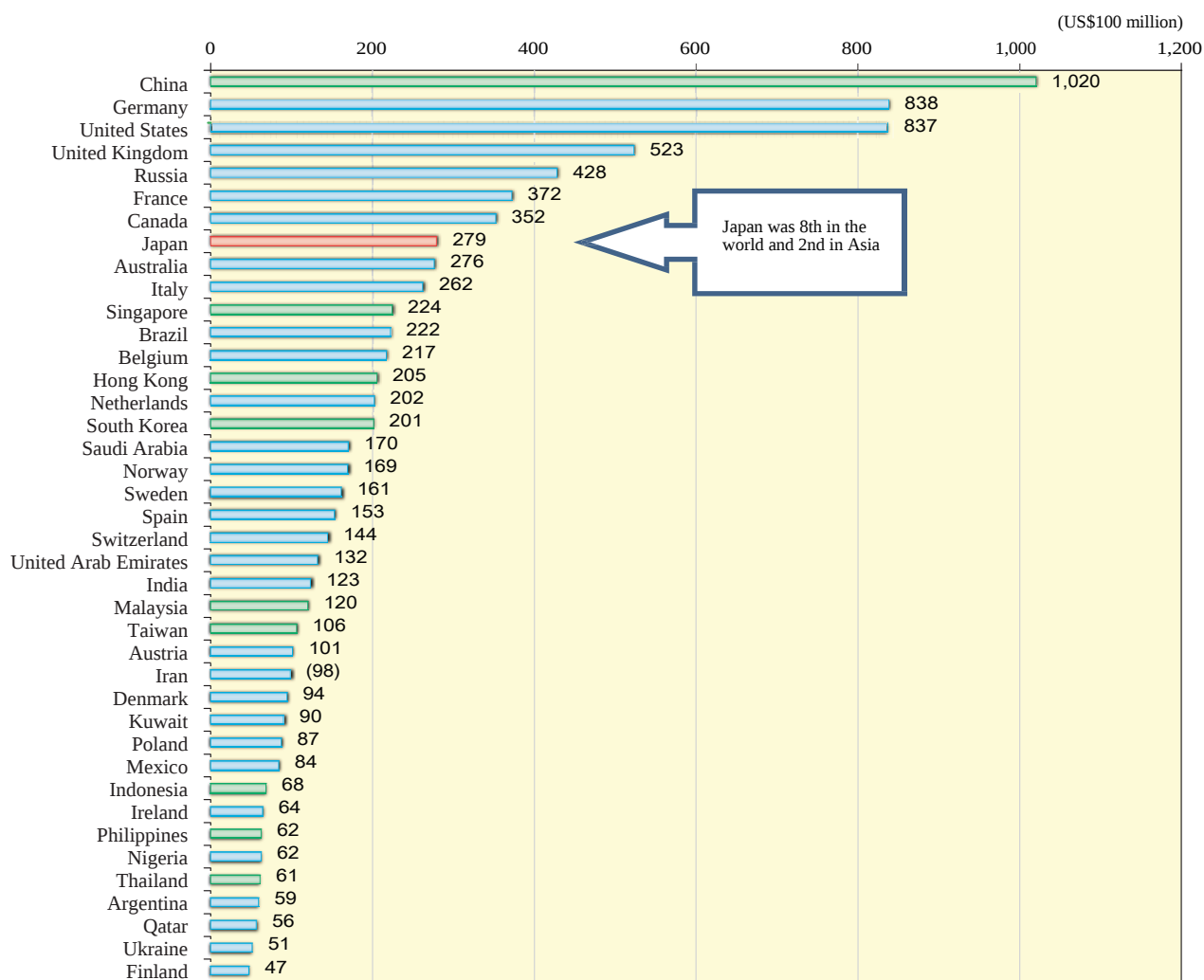
3 2011 data was used for Macao, United Arab Emirates, and Lebanon because values for 2012 are unknown.

4 The international tourism revenue shown here does not include international travelers' fares.

5 In some cases values for international tourism revenue is newly announced or are updated retroactively. Furthermore, when the values for international tourism revenue are converted into US dollars, values may differ depending on the foreign exchange rates at that time. Consequently, order may differ depending the timing of applying the values.

Regarding the international tourism expenditure by countries and regions in 2012, China ranked first with 102.0 billion dollars. Germany was second with 83.8 billion dollars, which was one rank lower than 2011. The United States came in third with 83.7 billion dollars, which was one rank lower to ranking second in 2011 just like Germany. International tourism expenditure in Japan increased to 27.9 billion dollars (ranked 8th (second in Asia)) from 27.2 billion dollars (ranked 9th (second in Asia)) in 2011, which rose both in amount and ranking. (Fig. I-10)

Fig. I-10 International Tourism Expenditure Ranking (2012)



(Note)

- 1 Prepared by the Japan National Tourism Organization (JNTO) based on materials from the UNWTO and each country's government tourism bureaus.
- 2 The international tourism expenditure shown here does not include international travelers' fares.
- 3 The values shown here are preliminary as of June 2013.
- 4 2011 data was used for United Arab Emirates and Iran because values for 2012 are unknown.
- 5 In some cases international tourism expenditure is newly announced or are updated retroactively. Furthermore, when the values for international tourism expenditure are converted into US dollars, values may differ depending on the foreign exchange rates at that time. Consequently, order may differ depending the timing of applying the values.

Regarding Japan's economic in 2013, stock prices rose due to the "three arrows", monetary easing, fiscal stimulus, and growth strategy, of "Abenomics" and, according to the "The Japanese Economy 2013 - 2104" of the Cabinet Office, the Japanese economy is gradually recovering.

2013 was an eventful year for Japan to be proud of in terms of tourism. There were momentous events such as the recognition of "Mt. Fuji, a sacred place and source of artistic inspiration" as a World Heritage site in June, and the inclusion of "Washoku, traditional dietary cultures of the Japanese" to the Intangible Cultural Heritage list in December. Furthermore, great joy spread throughout Japan in September with the news of Tokyo being awarded to host the 2020 Olympic and Paralympic Games.

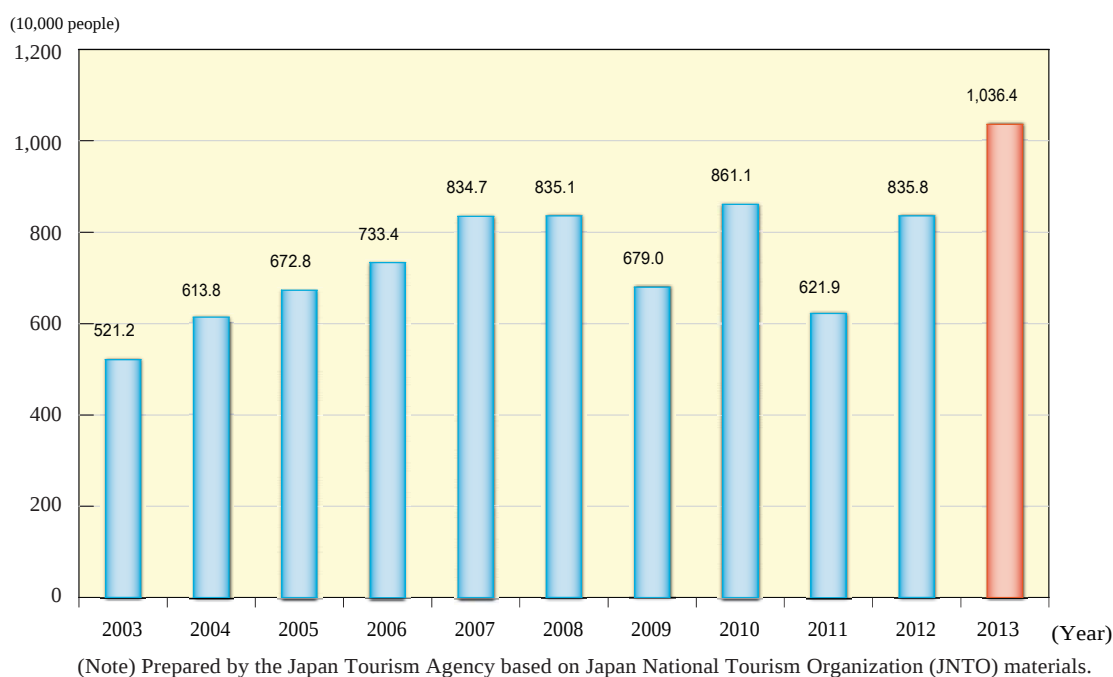
In addition, various events and festivals were held all around Japan in 2013. Tokyo Disney Land celebrated its 30th anniversary in April and the Kabuki Za in Ginza, Tokyo was renovated. Moreover, not only the metropolitan area but rural areas such as the shikinen sengu of Ise Jingu and honden senzasai of Izumo Oyashiro attracted attention.

Section 1 The Situation in Travel to Japan

1 The Situation in Travel to Japan

The number of foreign visitors to Japan in 2013 was 10.36 million (a year-on-year increase of 24.0%), which exceeded the past record of 8.61 million in 2010, and achieved 10 million per annum for the first time. (Fig. I-11)

Fig. I-11 Trend in the Number of Foreign Visitors to Japan



When looking at annual foreign visitors to Japan by countries and regions, a total of ten countries and regions including eight Asian countries and regions (Taiwan, Hong Kong, Singapore, Thailand, Malaysia, Indonesia, Vietnam, and India), Australia, and France, reached peak records.

As for South Korea, although the growth in the number of visitors to Japan has slowed down since August due to the harmful rumors of radiation-contaminated water, the share of foreign tourists to Japan accounting for 23.7% of the total, which was 2.46 million people, the second-highest following 2.6 million in 2007.

With regard to China, the ratio to the same month of the previous year fell largely from the beginning of the year to August due to the impact of the transfer of the ownership of the islands to the Japanese government last September; however, a rapid recovery has been observed since September. The share of foreign visitors to Japan accounted for 12.7% of the total, which was 1.31 million people (a year-on-year decrease of 7.8%), the third-highest annual value in history.

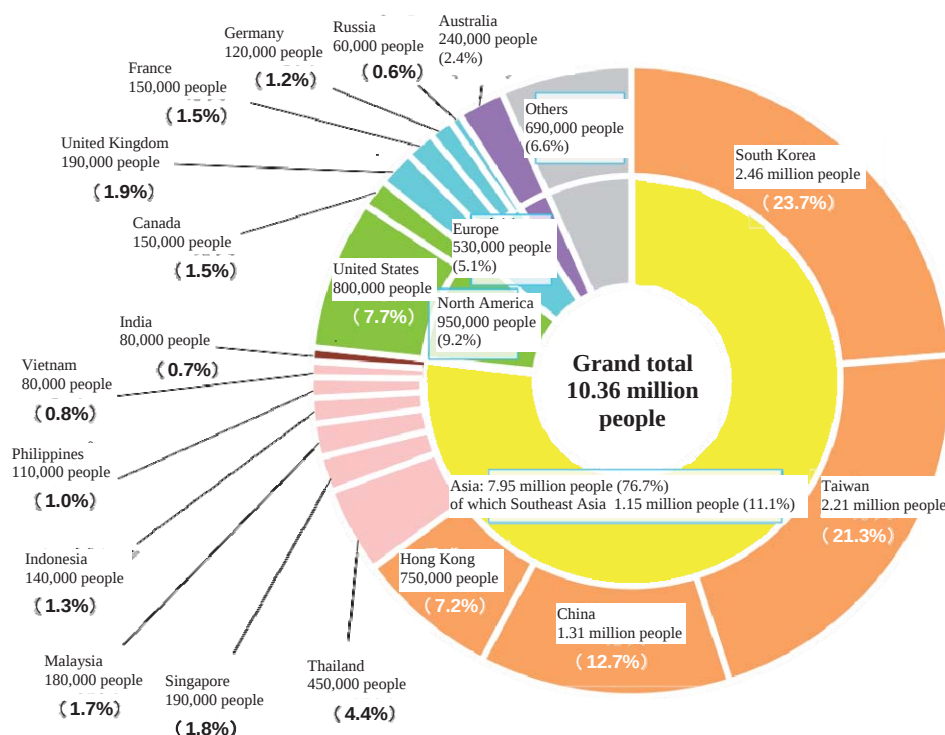
Foreign visitors from Taiwan and Hong Kong increased significantly due to increased supply of seats by new services of low cost carriers (LCCs), and increased travel demands owing to yen depreciation trends. The number of visitors were record high for both countries; 2.21 million people (a year-on-year increase of 50.8%) and 0.75 million people (a year-on-year increase of 54.9%) for Taiwan and Hong Kong, respectively. Shares in the total number of foreign visitors to Japan were 21.3% and 7.2%, respectively.

For the six countries (Thailand, Singapore, Malaysia, Indonesia, Philippines, Vietnam) in Southeast Asia, a record high total of 1.15 million people (a year-on-year increase of 3%) was achieved in 2013, the share in the total number of foreign tourists visiting Japan at 11.1%.

A steady rise of year-on-year at the 10% range was observed in Europe, the United States, and Australia with focus on France.

As for other regions, 50,000 people were Latin American and 27,000 people were African. (Fig. I-12)

Fig. I-12 Breakdown of the Number of Foreign Visitors to Japan (2013)



(Note)

1 Prepared by the Japan Tourism Agency based on Japan National Tourism Organization (JNTO) materials.

2 Shown in parentheses are shares within overall foreign visitors to Japan.

3 Inclusive of other countries within Asia and Europe that are not stated in the value.

The increasing number of foreign visitors is affecting the domestic accommodation industry. The total numbers of accommodation guests in 2013 (preliminary value) were 423 million (a year-on-year increase of

2.3%) and 33 million (a year-on-year increase of 26.3%) for Japanese and foreign nationals, respectively. Both numbers recorded the highest since the survey started, especially, the increase of foreign nationals was remarkable, and the percentage contribution to overall growth including the Japanese reached 42%. (Fig. I-13)

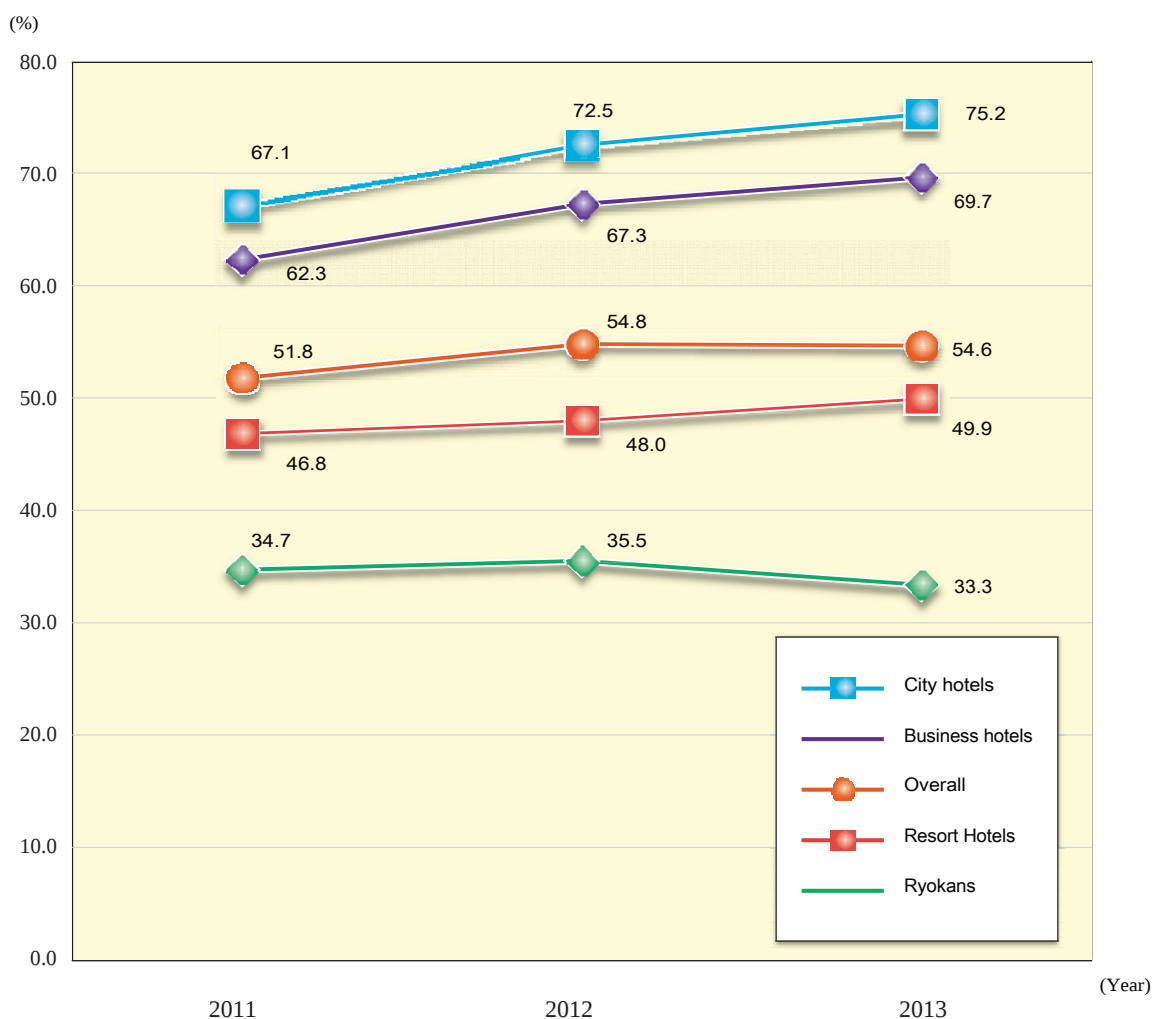
Fig. I-13 Total Number of Japanese and Foreign National Accommodation Guests (2013)

	Accommodation Guests	Accommodation Guests - Japanese (Share in total)	Accommodation Guests - Foreign Nationals (Share in total)
2012 (Annual revision)	439	413 (94%)	26 (6%)
2013 (Preliminary)	456	423 (93%)	33 (7%)
Increase (Share in total)	17	10 (58%)	7 (42%)

(Note) 1 Data based on the JTA's "Accommodation Survey"

Different trends for each accommodation are observed regarding guestroom occupancy rate. In terms of guestroom occupancy rates for the past three years (2011 to 2013), business hotels and city hotels are on an upward trend whereas ryokans are on a downward trend at 33.3% in 2013. (Fig. I-14)

Fig. I-14 Change in Guestroom Occupancy Rates



(Note) 1 Data based on the JTA's "Accommodation Survey"

With regard to the share of foreign overnight guests by accommodation, guests have increased in all accommodation categories in 2013 compared to 2012, but above all, increase of foreign guests in city hotels was outstanding, and the increase of foreign visitors is considered to have contributed to the increase in guestroom occupancy rates of city hotels (2012: 72.5%, 2013: 75.2%). (Fig. I-14, Fig. I-15)

Fig. I-15 Share of Foreign Nationals in the Total Number of Accommodation Guests by Accommodation (2012 to 2013)

	Accommodation Guests (Unit: million guest stays)		Accommodation Guests - Foreign Nationals (Unit: million guest stays)		Accommodation Guests - Foreign Nationals (Unit: million guest stays)	
	2012	2013	2012	2013	2012	2013
Ryokans	106	103	2	3	2.0	2.9
Resort hotels	65	67	3	4	4.7	6.5
Business hotels	170	180	8	10	4.7	5.4
City hotels	67	72	12	15	17.3	20.6
Overall	439	456	26	33	6.0	7.3

(Note) 1 Data based on the JTA's "Accommodation Survey." Values of 2013 are preliminary.

Guestroom occupancy rates in usual peak periods from July to September exceed 80% mainly in regions with large cities such as the metropolitan area, Kinki region, Hokkaido, Aichi Prefecture, Hiroshima Prefecture, etc.

Fig I-16 Guestroom Occupancy Rates by Prefecture and Accommodation (2013)

Guestroom Occupancy Rates in July to Sept. 2013 (%)	Accommodation Type			Guestroom Occupancy Rates in July to Sept. 2013	Accommodation Type		
	Resort hotels	Business hotels	City hotels		Resort hotels	Business hotels	City hotels
Nationwide	61.1	73.0	78.8	Mie	59.6	76.2	70.8
Hokkaido	62.4	81.9	84.9	Shiga	57.8	57.1	72.3
Aomori	61.0	75.9	64.7	Kyoto	63.9	81.0	84.2
Iwate	42.3	73.3	73.6	Osaka	73.9	81.5	84.2
Miyagi	47.8	82.5	72.3	Osaka	56.1	71.3	75.2
Akita	56.0	68.0	65.8	Nara	40.3	61.9	72.6
Yamagata	49.3	76.1	64.3	Wakayama	50.7	48.6	69.3
Fukushima	45.0	84.8	80.5	Tottori	22.3	77.5	77.2
Ibaraki	41.0	60.1	63.3	Shimane	35.6	80.7	67.2
Tochigi	56.6	65.4	49.3	Okayama	31.6	68.7	60.1
Gunma	45.6	61.0	64.0	Hiroshima	61.5	72.1	83.0
Saitama	38.6	82.1	71.3	Yamaguchi	50.1	61.7	63.7
Chiba	86.8	71.3	83.1	Tokushima	30.2	62.5	71.6
Tokyo	77.7	81.7	82.7	Kagawa	72.3	54.7	70.0
Kanagawa	70.7	80.1	82.3	Ehime	38.6	60.0	64.2
Niigata	36.7	67.2	69.6	Kochi	51.5	55.5	64.4
Toyama	66.6	71.0	74.6	Fukuoka	62.0	75.8	78.7
Ishikawa	56.4	69.0	72.2	Saga	53.5	62.4	53.6
Fukui	50.5	65.2	55.2	Nagasaki	59.3	68.7	67.6
Yamanashi	71.9	70.5	63.7	Kumamoto	67.4	66.9	73.6
Nagano	51.9	73.0	81.0	Oita	68.0	62.8	65.9
Gifu	55.6	61.9	67.8	Miyazaki	47.7	54.9	61.6
Shizuoka	55.9	65.3	66.0	Kagoshima	44.0	63.8	67.6
Aichi	47.2	66.7	80.1	Okinawa	80.1	70.0	72.6

(Note) 1 Data based on the JTA's "Accommodation Survey."

In terms of consumption during trip, the increase of foreign visitors to Japan has largely influenced domestic consumption. The amount of consumption during trip by foreign visitors increased 30.6% from 1.1 trillion yen in 2012 to 1.4 trillion yen in 2013. The travel consumption of Japanese domestic tourists increased 4.0% from 19.8 trillion yen in 2012 to 20.6 trillion yen in 2013. (Fig. I-17)

Fig I-17 Change in the Amount of Consumption during Trip

	(Trillion yen)			
	2010	2011	2012	2013
Travel Consumption by Foreign Visitors to Japan	1.1	0.8	1.1	1.4
Travel Consumption by Japanese Domestic Tourists	20.8	20.1	19.8	※20.6

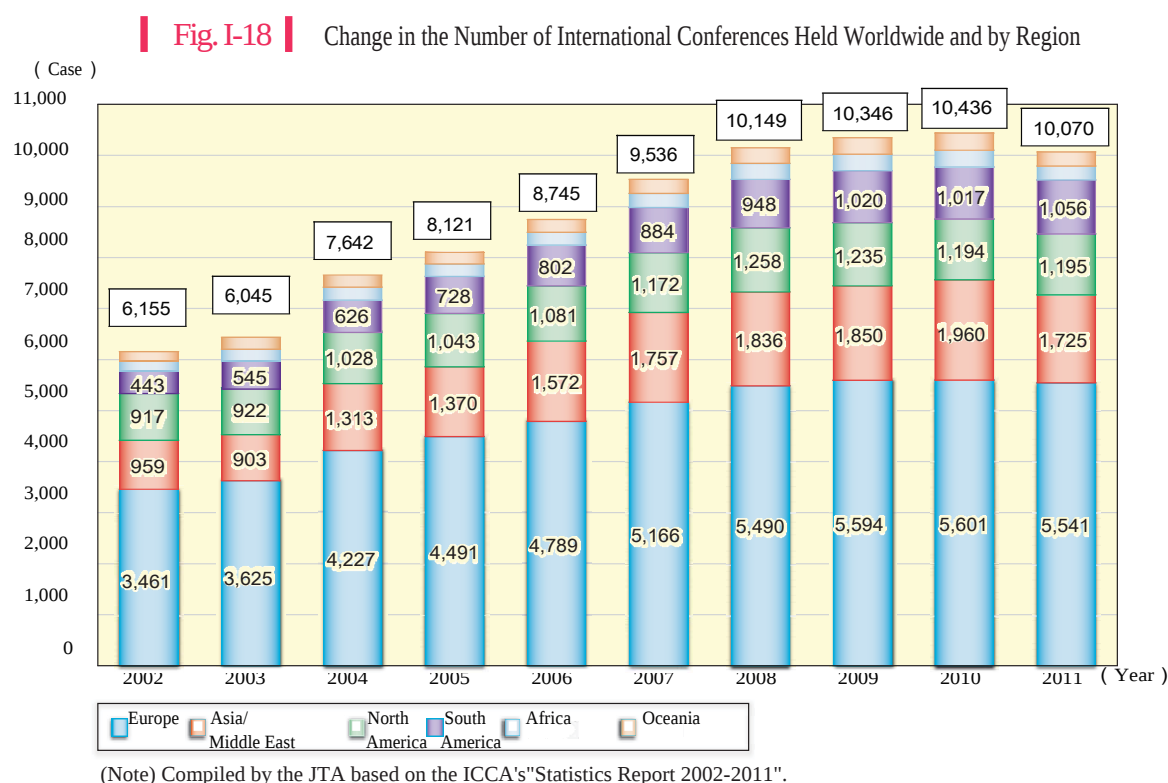
(Note) Compiled by the JTA based on the "Consumption Trend Survey for Foreigners Visiting Japan" and "Survey on Travel / Tourist Spending Trends". * preliminary

2 Situation of International Conventions

(1) Situation of conventions held worldwide and by region

According to statistics of the International Congress and Convention Association (ICCA), an international organization with members of organizations and business related to international conferences, the number of international conferences held worldwide is growing every year. With regard to the number of conferences held by region, a majority of worldwide conferences are held in Europe where many headquarters of international institutions and academic societies exist; however, the increase in the number of conferences held is especially significant in Asia / Middle East, and South America regions in the background of rapid economic

growth. The number of international conferences held in Asia, Middle East, and South America regions has increased approximate 1.8 times and 2.4 times, respectively, in the past ten years. (Fig. I-18)



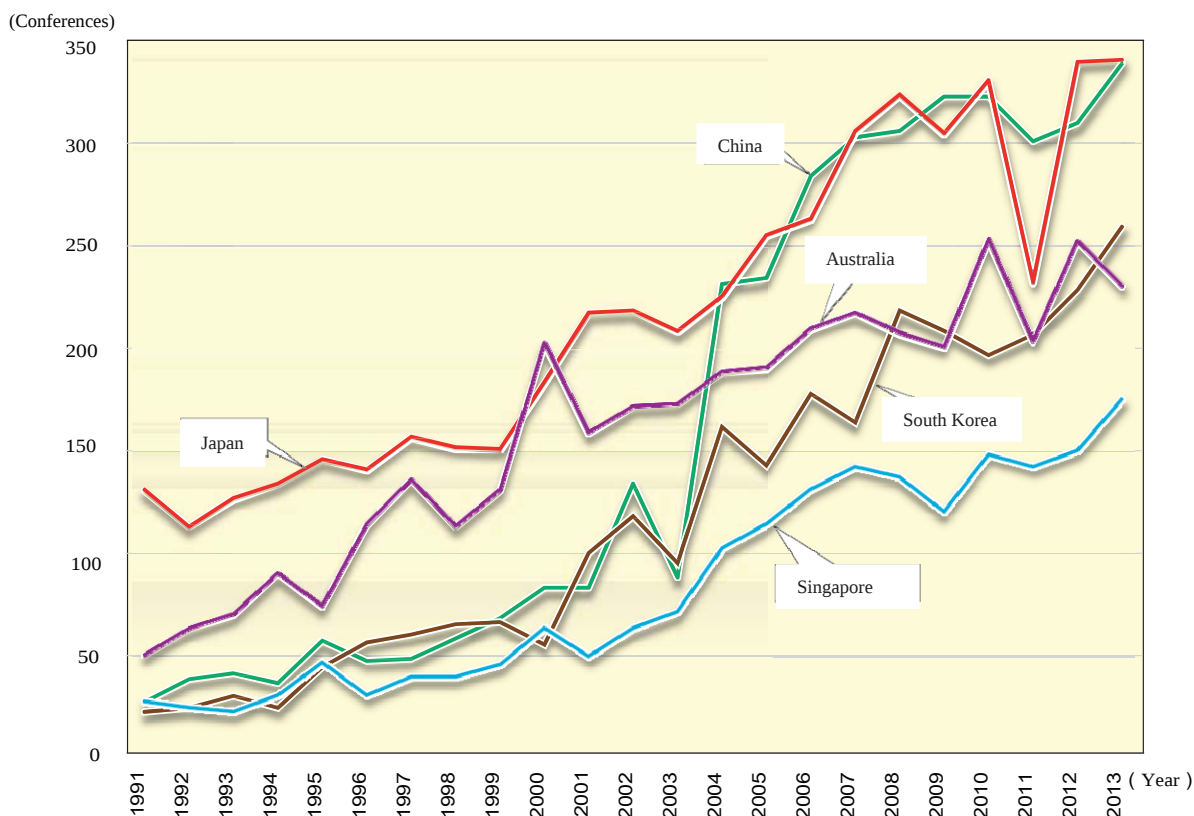
(2) Situations of conferences held in major Asian countries and Japan

The number of international conferences held by country in the Asia - Pacific region, is recently on the rise in all major countries including Japan. (Fig. I-19)

Japan's share in the total number of conferences held in the five major countries (Japan, China, South Korea, Singapore and Australia) within the region was 51% approximately 20 years ago, but subsequently fell. Japan was overtaken by China in 2011 and ranked down second place. (Fig. I-20)

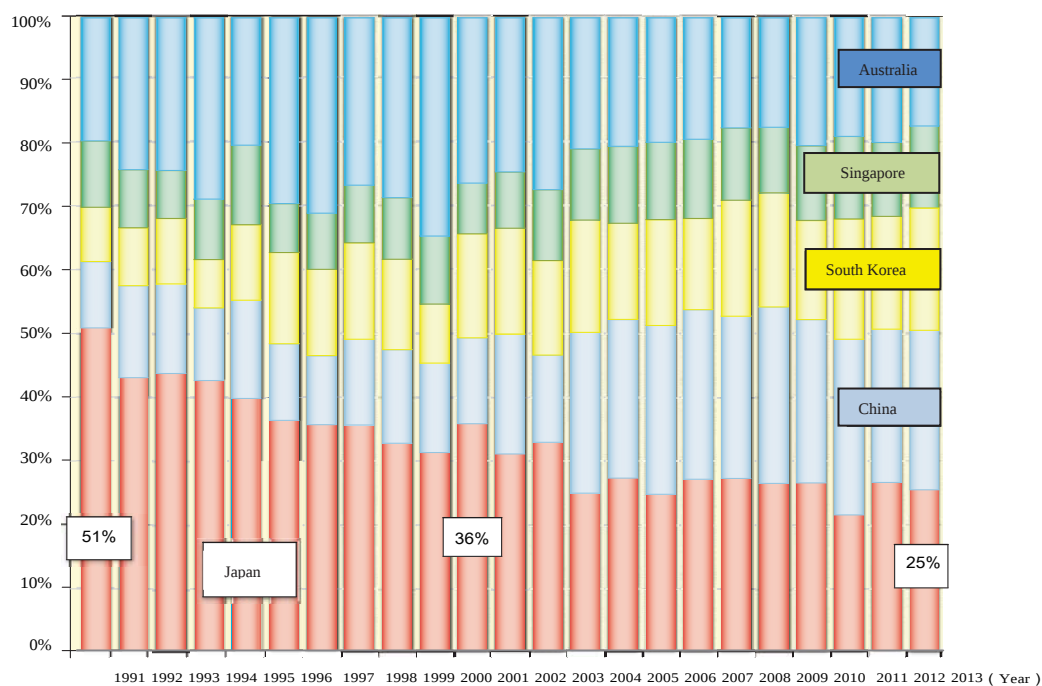
2013 is the year with the results of the All- Japan initiatives taken mainly by Japan National Tourist Organization (JNTO) which came to fruition, and Japan was elected the hosting country for large-scale international conferences such as the 23rd World Congress of Neurology (to be held in Kyoto in 2017 with 7,000 people) and the 22nd International Congress of Nutrition (to be held in Tokyo in 2021 with 4,500 people) one after the other.

Fig. I-19 Number of International Conferences Held in Major Countries in Asia-Pacific (1991 to 2013)



(Note) Compiled by the JNTO based on ICCA (International Congress and Convention Association) statistical data.

Fig. I-20 Change in Japan's Share in the Number of International Conferences Held in Major Countries in the Asia-Pacific Region (1991-2013)



(Note) Compiled by the JNTO based on ICCA (International Congress and Convention Association) statistical data.

Section 2 Verification of Factors of Achieving 10 Million Foreign Visitors

As aforementioned, the annual number of foreign visitors Japan has exceeded 10 million people for the first time in 2013. The increase of foreign visitors has been one of the main goals of Japan's tourism policy since the launch of the Visit Japan Project (hereinafter referred to as "VJ") in 2003. The number of foreign visitors doubled in a decade from 5.21 million in 2003 to 10.36 million in 2013.

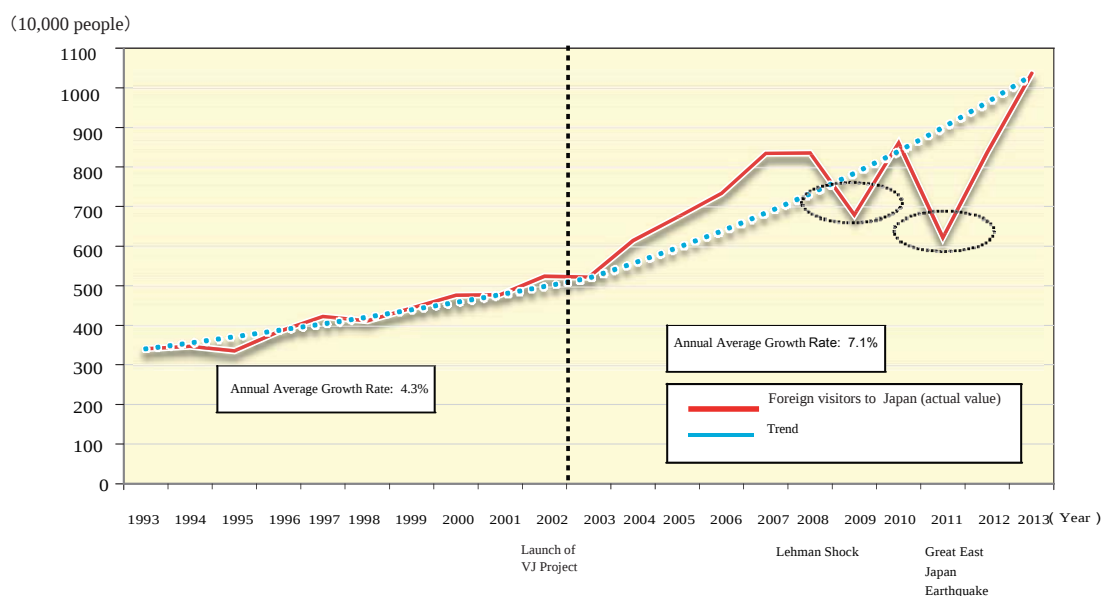
When looking at the change in the number of foreign visitors in the past 20 years, a difference in trend is observed before and after the launch of the VJ project in 2003 with increasing growth rate. Despite the occurrence of events such as the Lehman Shock and the great East Japan earthquake that largely drove back travel demands after 2003, the annual average growth rate of foreign visitors during this period was 7.1%, which largely exceeded the annual average growth rate (4.6%) of worldwide international tourist arrivals of the same period.

(Fig. I-21, Fig. I-22)



Ceremony to commemorate reaching 10 million foreign visitors to Japan
(December 20, 2013 at Narita Airport)

Fig. I-21 Trend in the Number of Foreign Tourists Visiting Japan

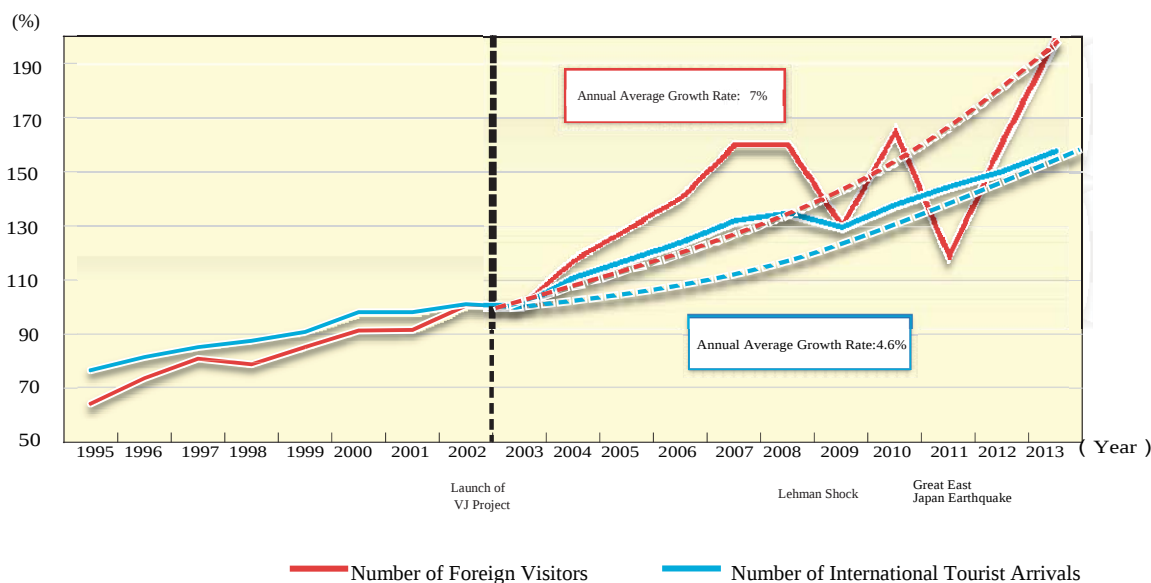


(Note)

1 Prepared by the Japan Travel Agency based on Japan National Tourism Organization (JNTO) materials.

2 Trend in the number of foreign tourists: Estimated as a fixed annual growth rate for 1993 to 2003 and 2003 to 2013.

Fig. I-22 Trends in the Number of Foreign Visitors and International Tourist Arrivals



As mentioned above, besides the effect of global economic growth including Asian countries, the effect of tourism policies (measures including the VJ project) adopted since 2003 are considered to be the factors contributing to the annual average growth rate of foreign visitors.

In this section, the impact of changes in the economic situations surrounding Japan and effects of tourism-related policies including the VJ project are examined.

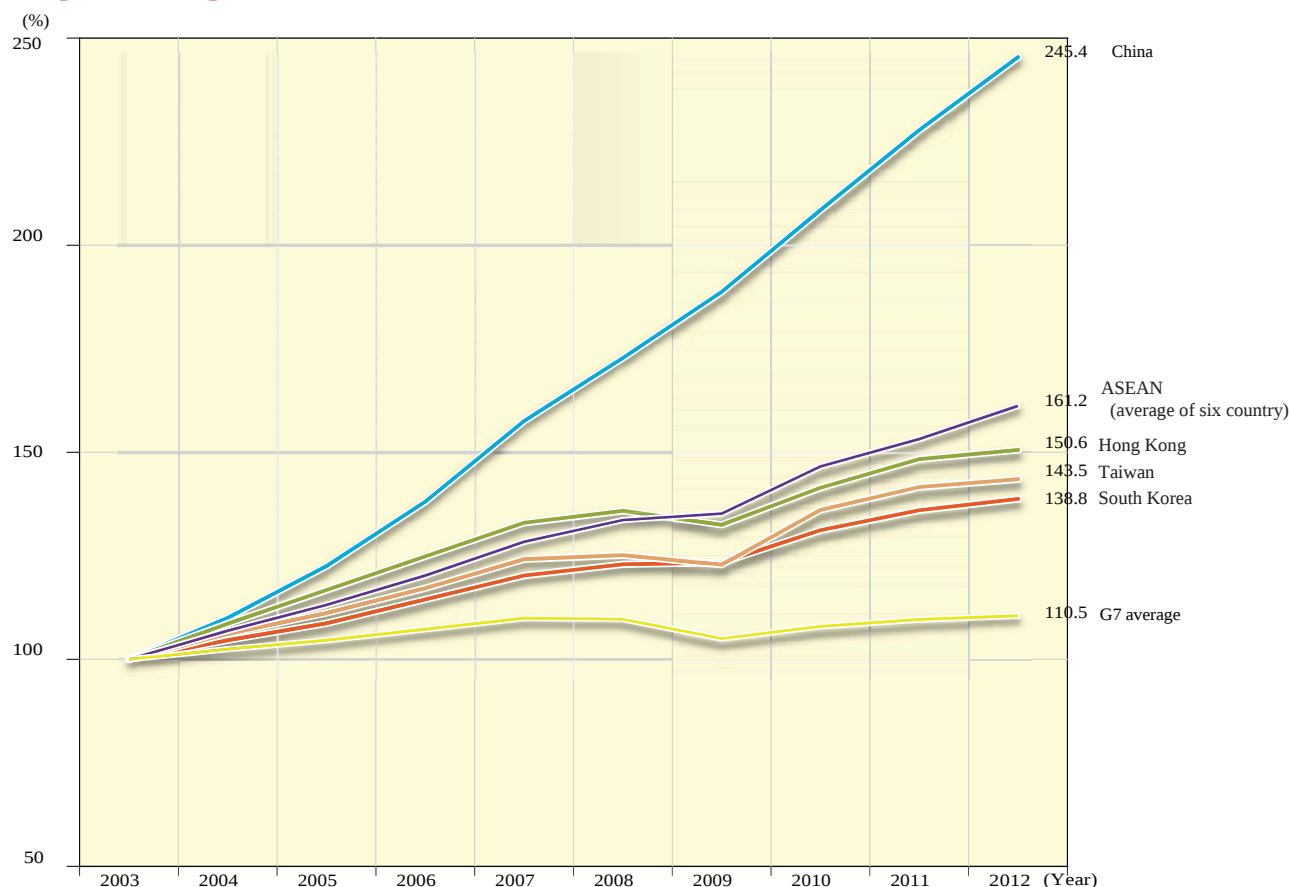
1 Changes in the economic situations surrounding Japan

Because closer countries are easier to travel from the viewpoint of time or cost, visitors from Asia account for 76.7% of the number of foreign visitors to Japan. This is why the increase of high-income population due to economic growth in neighboring countries contributes to the growth of foreign visitors.

Since 2003, the real GDP of neighboring East Asian countries (China, South Korea, Hong Kong and Taiwan) and six ASEAN member countries (Singapore, Malaysia, Thailand, Philippines, Indonesia and Vietnam) expanded largely in comparison to advanced countries (G7).

With the year 2003 indexed as 100, the level of real GDP in 2012 for the average of G7 was 110.05, whereas that of China was 245.4, average of six ASEAN member countries was 161.2, Hong Kong was 150.6, Taiwan was 143.5, South Korea was 138.8, all of which were higher than the G7 average. (Fig. I-23)

Fig. I-23 Trend in Economic Growth in East Asia and ASEAN (average of six countries) (2003=100)



(Note)

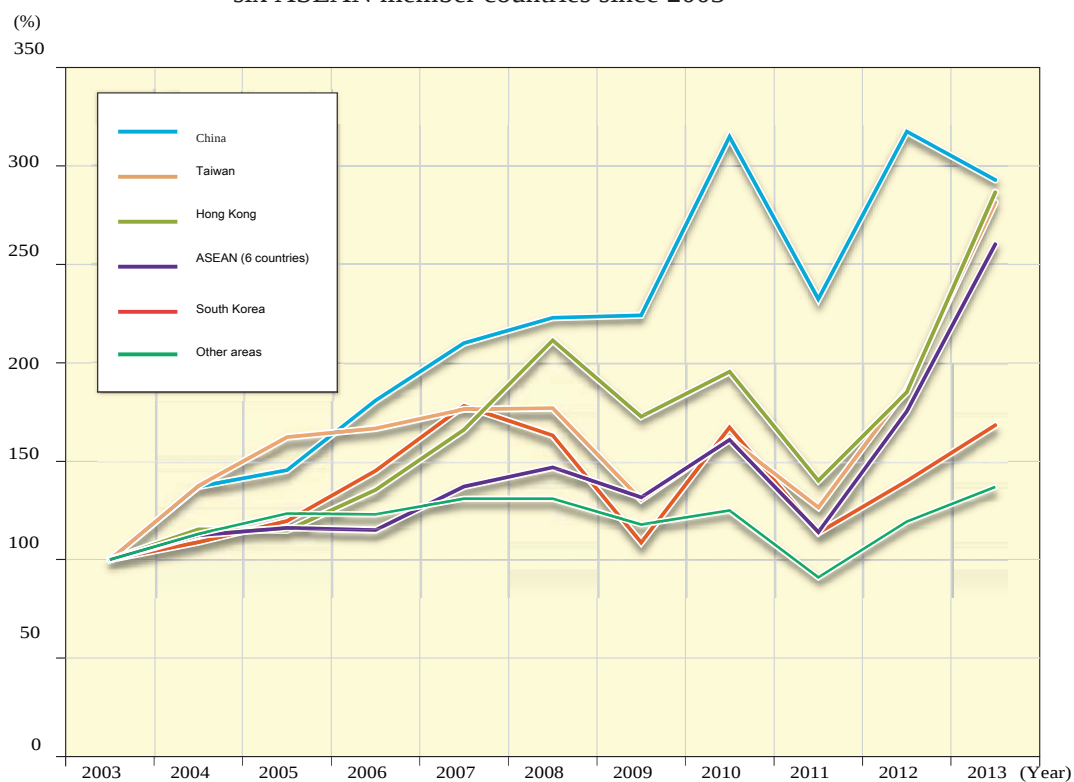
1 Based on IMF's "World Economic Outlook Database".

2 Real GDP of 2003 indexed as 100.

As for foreign visitors, the number of foreign visitors in neighboring China, Hong Kong, Taiwan, South Korea, and six ASEAN member countries in 2013, with foreign visitors in 2003 indexed as 100, exceeded 250 in China, Hong Kong, ASEAN 6, and Taiwan, and was 168.3 for South Korea. (Fig. I-24)

In this way, the steady economic growth in neighboring countries of East Asia and ASEAN led to the increase of a highincome population who can afford international travel, which contributed to the growth in foreign visitors to Japan.

Fig. I-24 Trend in foreign visitors to Japan from East Asia and six ASEAN member countries since 2003



(Note)

1 Prepared by the Japan Tourism Agency based on Japan National Tourism Organization (JNTO) materials.

2 The level of visitors to Japan in 2003 indexed as 100.

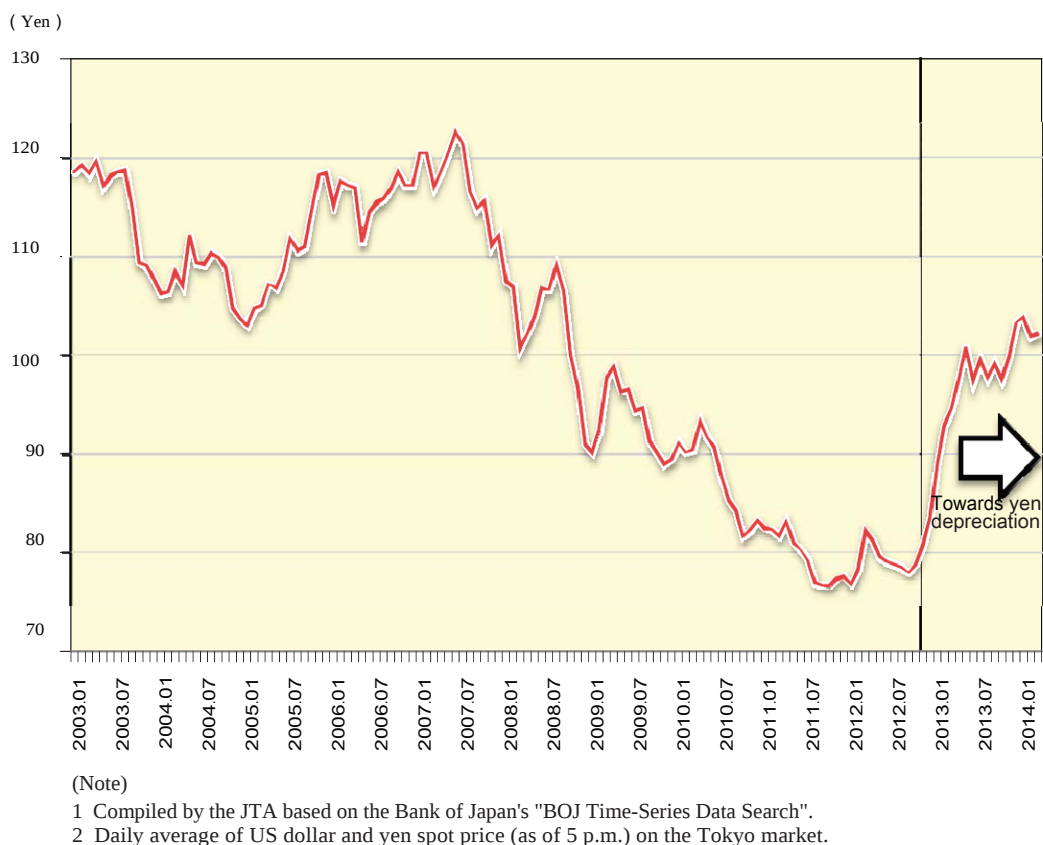
Transition towards yen depreciation in the exchange rate is considered as one of the short-term factors since 2012.

The yen-to-dollar rate transitioned toward yen appreciation from the serious subprime loan problem and the declining economies of Europe and the US due to the Lehman Shock. Yen started to weaken from around the end of 2012 and rates have been around \$1/100 yen since then. (Fig. I-25)

As a result, giving the impression that travel to Japan is inexpensive since the end of 2012 greatly contributed to the rapid increase of foreign visitors in 2013.

As shown in Fig. I-24, increased growth rates in foreign visitors are seen, especially from Hong Kong, Taiwan, and the six ASEAN member countries, since the yen depreciation in 2013.

Fig. I-25 Trend in yen-to-dollar rate since 2003



2 Visit Japan Promotion in cooperation with the public and private sectors

The VJ project, which is a specific measure of the Visit Japan Promotion launched in 2003, is implemented in 14 countries and regions as priority markets as of 2013. Budget has been prioritized for these markets and active efforts have been made in raising awareness of Japan as a overseas travel destination and support has been provided to visitors to Japan through local travel agencies.

Specifically, by promoting in overseas the route from Tokyo to Kyoto or Osaka with a detour to Mt. Fuji as the "Golden Route" from the beginning of the VJ project, the route has currently become a popular standard for visitors from various countries. As a result of implementing promotions with a theme of "Japanese sakura that tells the story of sakura and the Japanese" such as the history of sakura, the culture of enjoying the sakura, to viewing the sakura in an open-air bath, to sakura-mochi (rice cake) in major countries including the Chinese and Taiwanese markets, a "sakura-viewing tour to Japan" has already been becoming a standard in many countries.

In addition, Japan has become a popular travel destination for foreigners in a decade since the VJ project and various regions have become popular by implementing the Visit Japan Promotion to meet the needs of each country, such as the Tateyama Kurobe Alpine Route for Taiwan, Hong Kong, and Southeast Asia, Niseko for Australia, and Kyushu for South Korea.

Effective promotion by an All Japan structure has been implemented for the VJ project through strengthened cooperation with local municipalities, tourism-related organizations, and institutions with overseas offices such as diplomatic missions abroad, and by using the brand power and overseas network of the private sectors.

Although there were negative factors such as the great East Japan earthquake and the accident at the Fukushima No. 1 nuclear power plant in 2011, the decline of foreign visitors was contained to a minimum by implementing promotions specializing in the provision of fast and accurate information and countermeasures on harmful rumors.

Due to the drop in foreign visitors from South Korea, which is the largest market, because of the news on radiation-contaminated water in the end of July 2013 in midst of continuously implementing the Visit Japan Promotion through the VJ project, the JTA along with the Ministry of Land, Infrastructure, Transport and Tourism (MLIT) implemented "emergency measures to achieve the goal of 10 million foreign visitors".

JTA'S VJ project schedules were moved forward to be implemented within the year to the extent possible, new projects were added, and the JTA and MLIT took the initiative for conducting inspection tours to Japan by requesting cooperation from various domestic and overseas persons in relevant local municipalities and economic organizations / enterprises regardless of the tourism boundary.

(最後の一文の翻訳がない)

3 Relaxation of visa requirements

Relaxation of visa requirements is a measure that contributes to the increase in foreign visitors to Japan.

The majority of advanced countries are already exempt from obtaining visas in advance for short stays in Japan, however, relaxation for some emerging countries is still underway. (Fig.I-26)

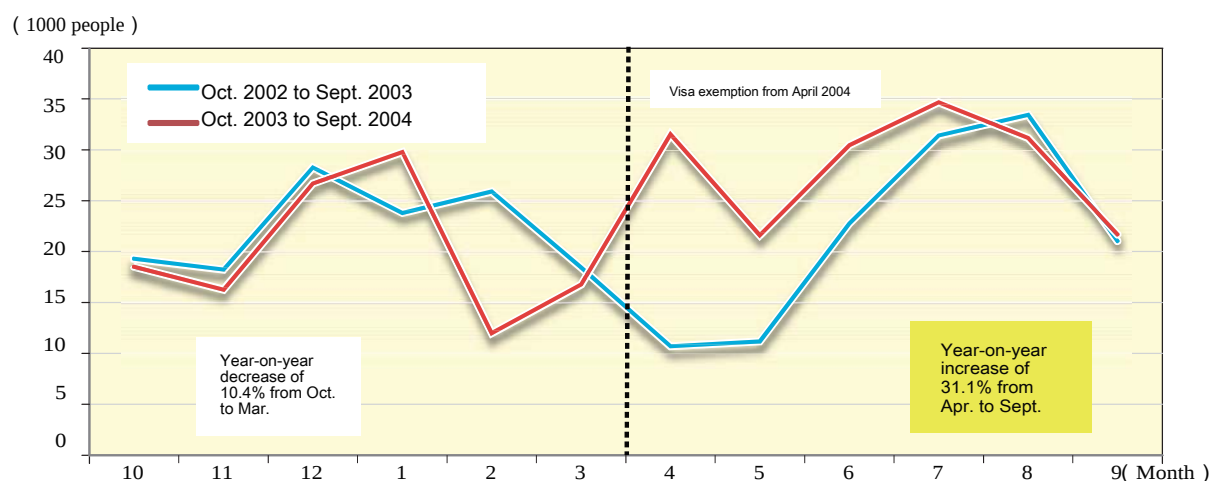
Fig.I-26 Relaxation of Visa Requirements implemented after 2000

	Nationality / region of tourist	Details of visa relaxation
Sept. 2000	China	Group tour visa issuance starts (residents of Beijing City, Shanghai City, and Guangdong Province)
Apr. 2004	Hong Kong	Visa Exemption
Sept. 2004	China	Regions for group tour visa issuance expanded (residents of Liaoning Province, Shandong Province, Tianjin City, as well as Jiangsu Province and Zhejiang Province)
Mar. 2005	South Korea	Provisional exemption (exemption continues from March 2006 without time limitations)
Mar. 2005	Taiwan	Provisional exemption (exemption continues from September 2006 without time limitations)
Jul. 2005	China	Regions for group tour visa issuance expanded to nationwide
Jul. 2009	China	Personal tour visa issuance starts (in three government offices of Beijing, Shanghai, and Guangzhou)
Jul. 2010	China	Regions for personal tour visa issuance expanded to nationwide
Jul. 2011	China	Multiple-entry visa issuance for Okinawa starts
Jul. 2012	China	Multiple-entry visa issuance for three prefectures of Tohoku (Iwate, Miyagi, Fukushima) starts
Jul. 2013	Thailand	Visa Exemption
Jul. 2013	Malaysia	Visa Exemption
Jul. 2013	Indonesia	Expansion of visit duration of multiple-entry visa (from 15 to 30 days)
Jul. 2013	Philippines	Issuance of multiple-entry visa starts
Jul. 2013	Vietnam	Issuance of multiple-entry visa starts
Nov. 2013	Cambodia	Issuance of multiple-entry visa starts
Nov. 2013	Laos	Issuance of multiple-entry visa starts
Jan. 2014	Myanmar	Issuance of multiple-entry visa starts

(Note) Yellow indicates visa exemption

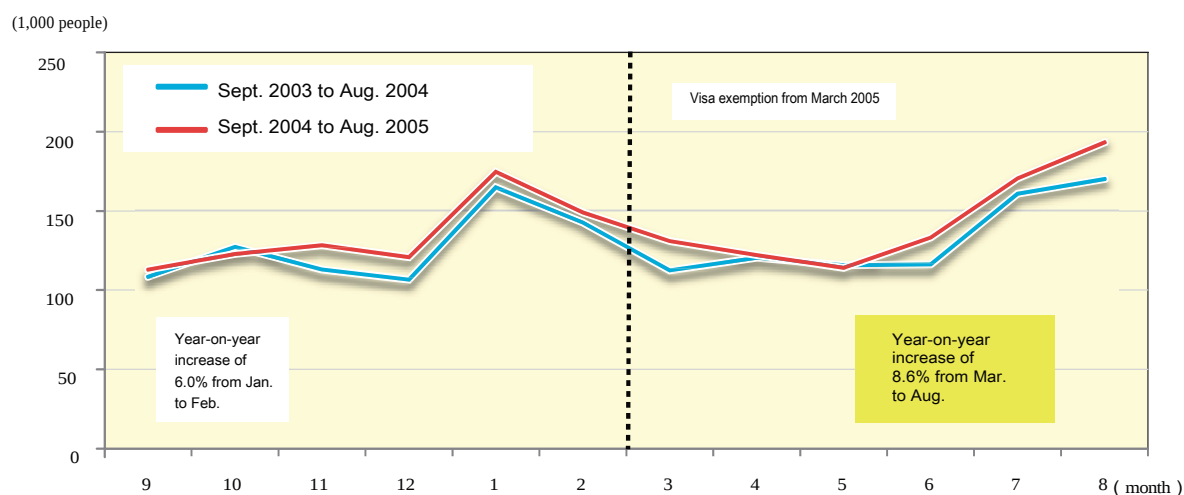
As for East Asian countries that currently account for more than half the number of foreign tourists visiting Japan, visa was exempted for Hong Kong in April 2004, and for South Korea and Taiwan in March 2005. Regarding Hong Kong, South Korea, and Taiwan where visa was exempt, the change of foreign visitors to Japan before and after the exemption is a 31% increase for Hong Kong in April to September 2004 from the same period of the previous year, and 9% and 18% for South Korea and Taiwan, respectively, in March to August 2005 from the same period of the previous year, all indicating a greater year-on-year growth rate after the exemption. (Fig. I-27, Fig. I-28, Fig. I-29)

Fig. I-27 Change in the Number of Foreign visitors Before and After Visa Exemption (effected on April 1, 2004, Hong Kong)



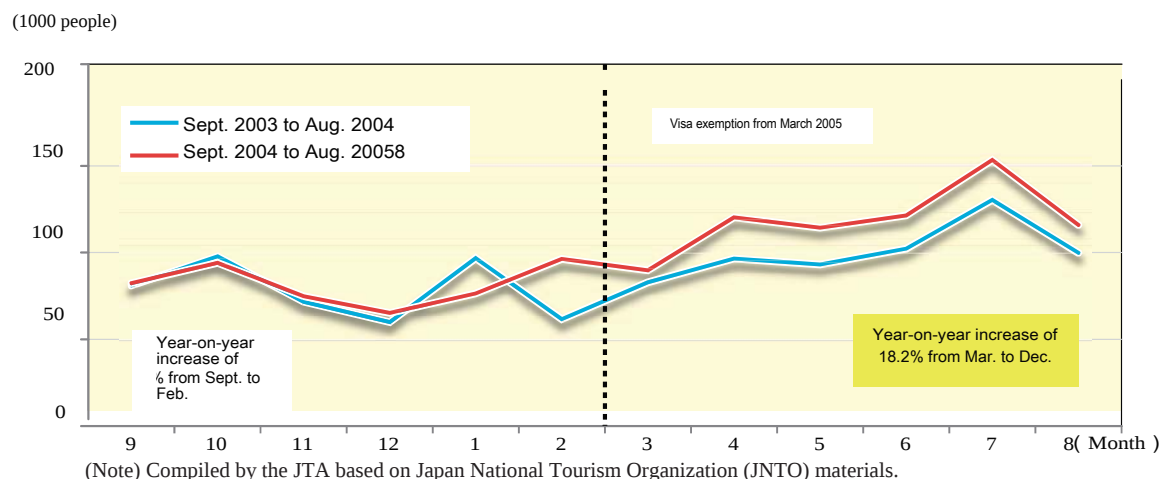
(Note) Compiled by the JTA based on Japan National Tourism Organization (JNTO) materials.

Fig. I-28 Change in the Number of Foreign Visitors Before and After Visa Exemption (effected on March 1, 2005, South Korea)



(Note) Prepared by the Japan Tourism Agency based on Japan National Tourism Organization (JNTO) materials.

Fig. I-29 Change in the Number of Foreign Visitors Before and After Visa Exemption
(effected on March 11, 2005, Taiwan)



For the ASEAN member countries, visa was exempt for five countries in July 2013 in light of the 40th Year of ASEAN-Japan Friendship and Cooperation.

Visa exemption in Thailand and Malaysia especially led to the rapid growth of foreign visitors with combined effects of measures such as the economic environment of exchange rates, etc., and enhanced airline networks.

When change in the number of foreign visitors from Thailand and Malaysia of 2013, where visa was exempt, was compared to that of 2012, growth rates are higher in the second half (after July), indicating a 96% increase for Thailand and 53% increase for Malaysia in the latter half of 2013 from the same period of the previous year.

Additionally, the rising trend continues even in 2014, the number of foreign visitors in January to March having year-on-year increases of 64% and 61% for Thailand and Malaysia, respectively. (Fig. I-30, Fig. I-31)

Fig. I-30 Change in the Number of Foreign Visitors Before and After Visa Exemption
(effected on July 1, 2013, Thailand)

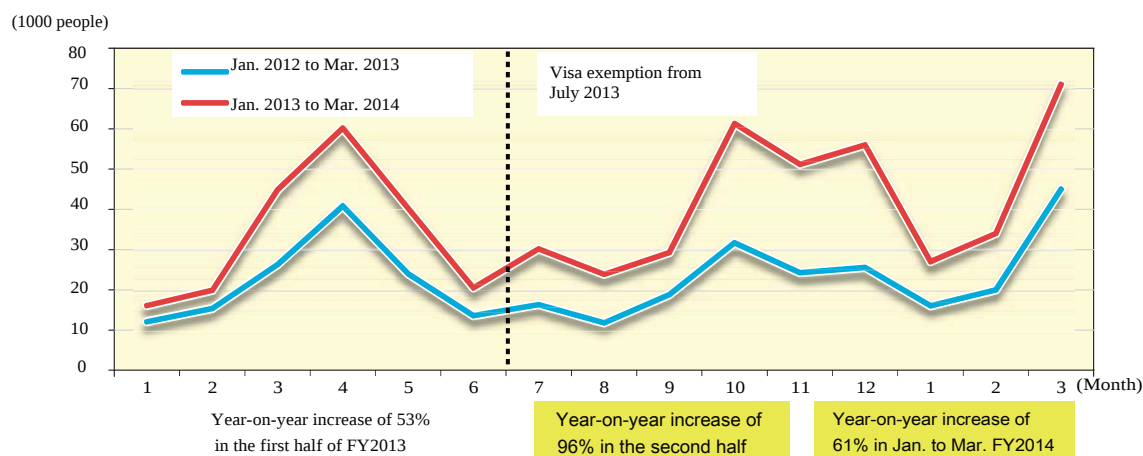
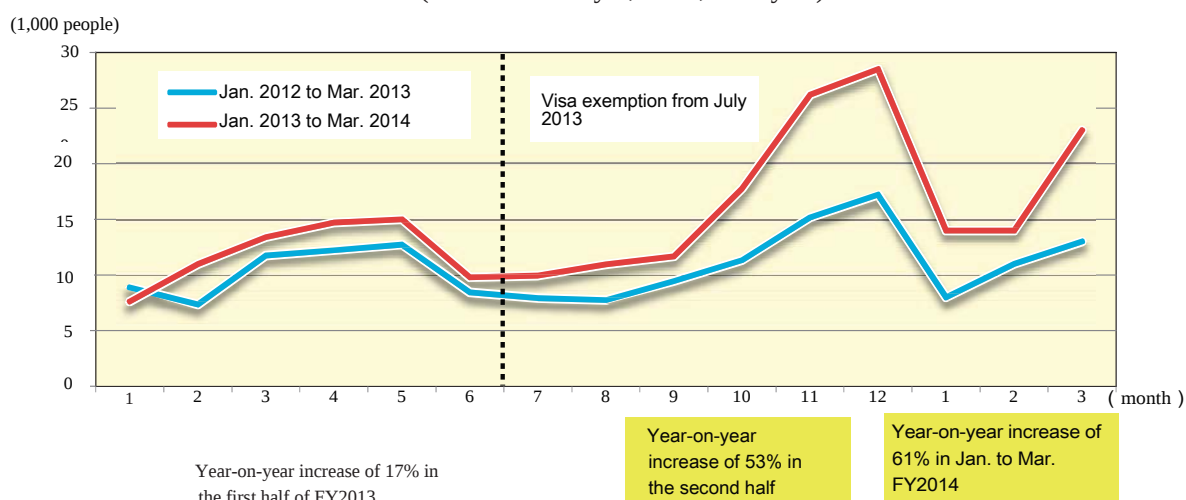


Fig. I-31 Change in the Number of Foreign Visitors Before and After Visa Exemption
(effected on July 1, 2013, Malaysia)



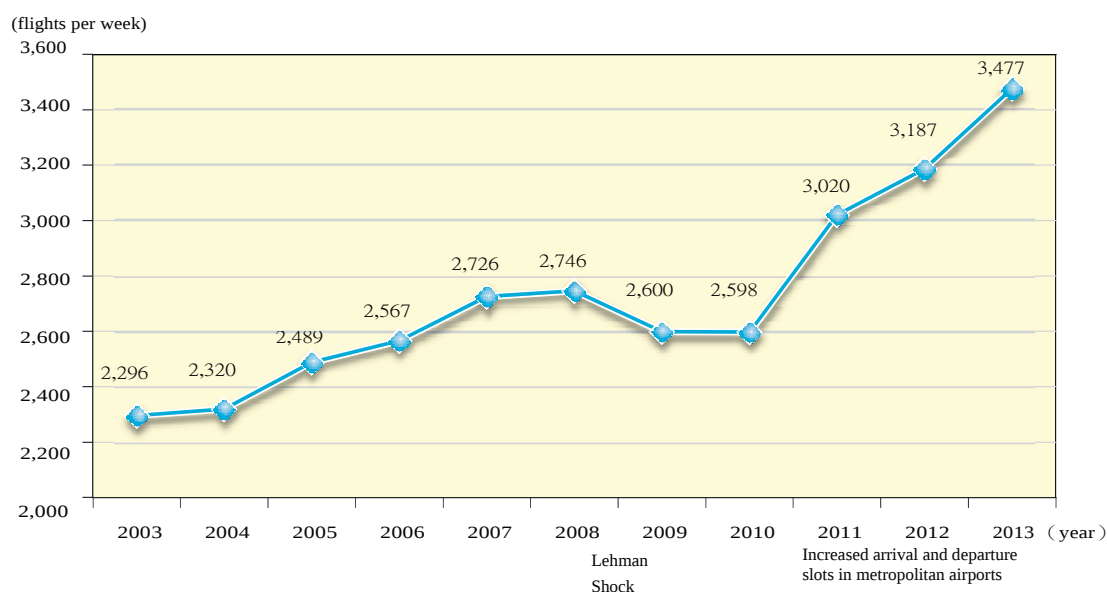
(Note) Compiled by the JTA based on Japan National Tourism Organization (JNTO) materials.

4 Enhancement of airline network

The number of international flights to and from Japan declined in 2009 and 2010 in the period after 2003 due to the effects of the Lehman Shock, however, the number shows a steady growth in other years. The number of flights increased by over 1.5 times from 2,296 flights per week in 2003 to 3,477 flights per week in 2013. (Fig. I-32)

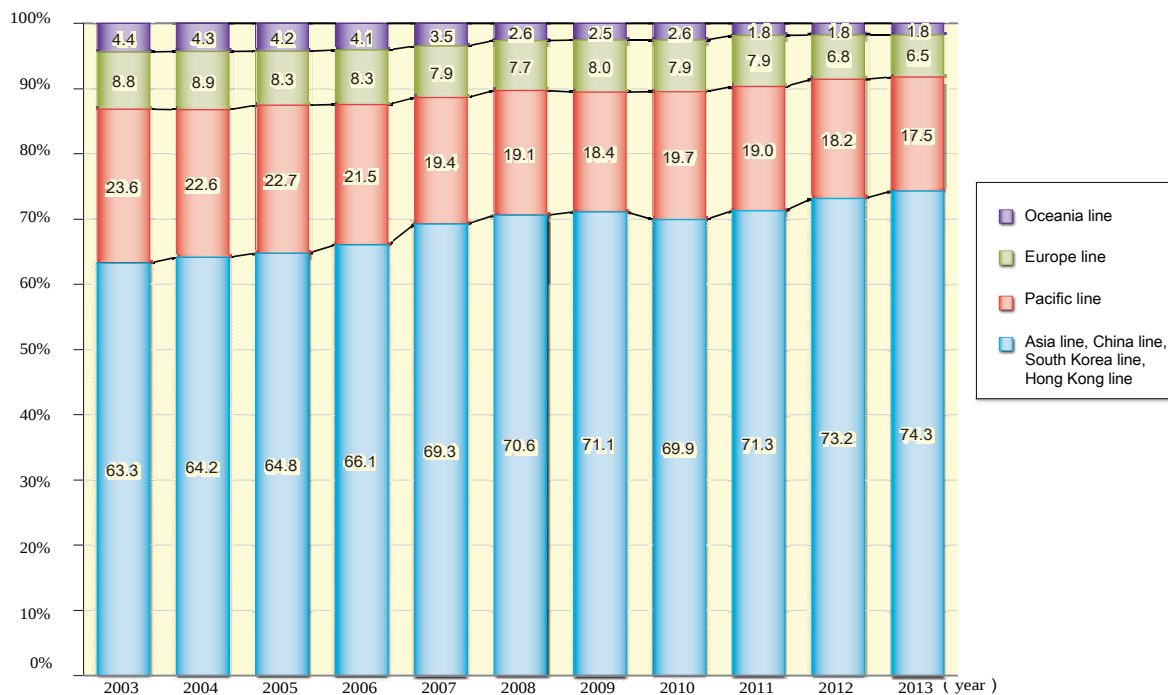
Growth rates are especially high in lines for China, South Korea, Hong Kong, and Asia towards East Asia and the ASEAN, the share in the total number of flights to and from Japan rising from 63.3% in 2003 to 74.3% in 2013. (Fig. I-33)

Fig. I-32 Change in the Number of International Flights to and from Japan



(Note) Compiled by the JTA based on Japan Civil Aviation Promotion Foundation's "Aviation Observed by Values".

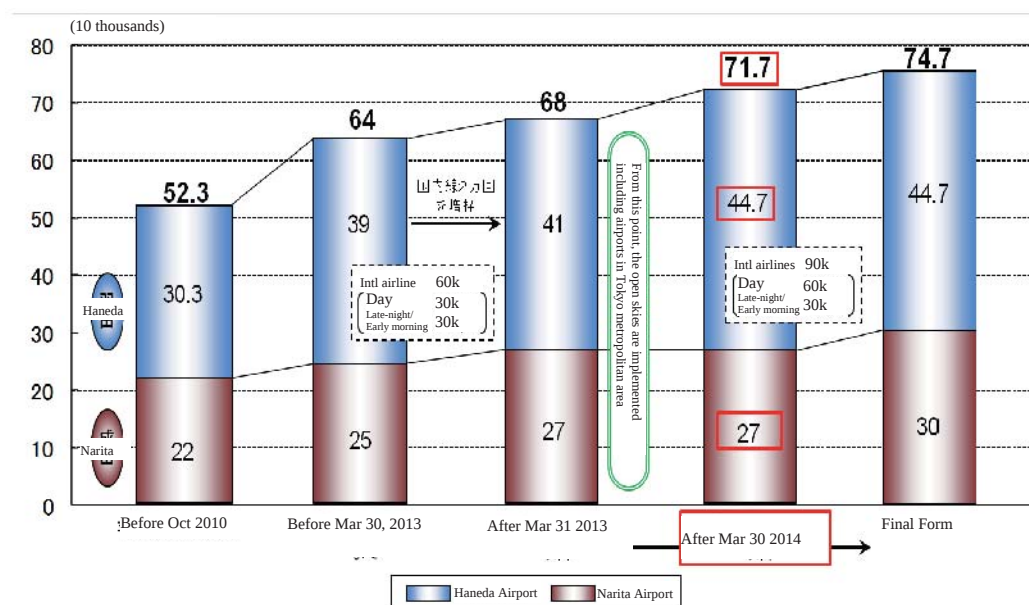
Fig. I-33 Share of the Number of International Flights to and from Japan



(Note) Compiled by the JTA based on Japan Civil Aviation Promotion Foundation's "Aviation Observed by Values".

The expansion of arrival and departure slots in metropolitan airports as well as the increased services of LCCs is background factors. Arrival and departure slots in metropolitan airports (Haneda and Narita) were 523,000 times in October 2010 and will be increased to 747,000 times within FY2014. (Fig. I-34)

Fig. I-34 Expansion of Arrival and Departure Slots in Haneda and Narita Airports

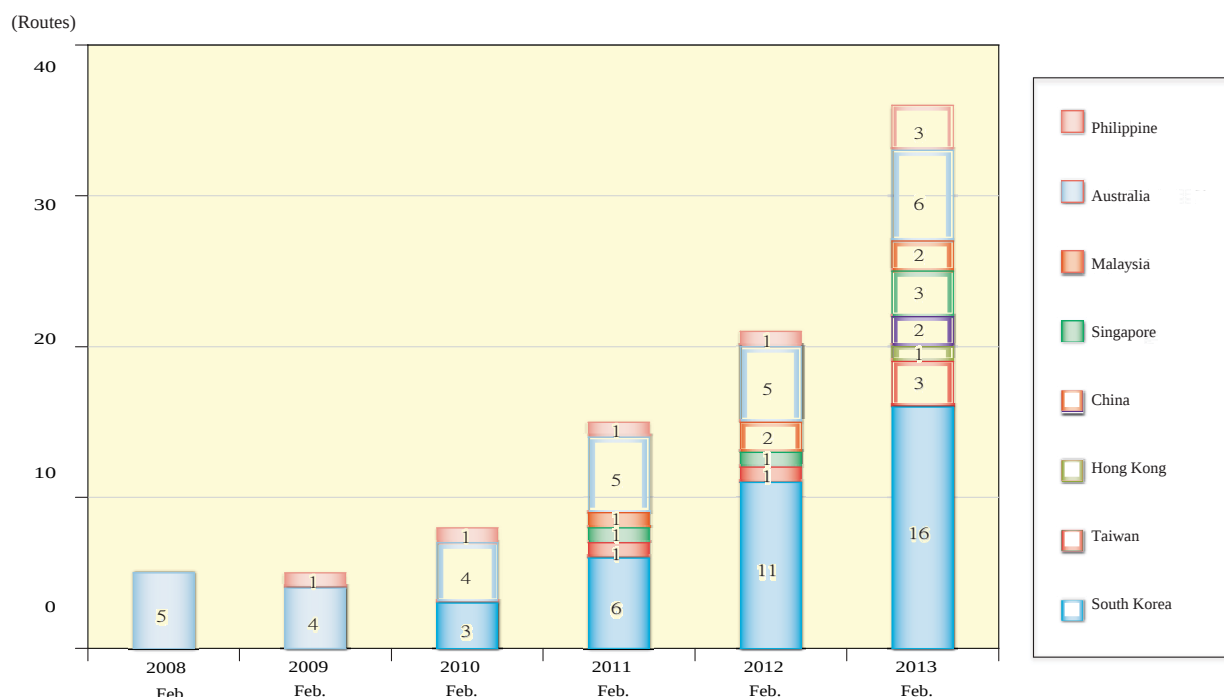


(Note)

- 1 Created by the MLIT Civil Aviation Bureau.
- 2 All values indicate the number of times per annum.
- 3 Arrival and departure are counted as one each, the number of times counted as two for coming and going once.
- 4 The number of arrival and departure slots for Haneda Airport includes slots used for late-night and early-morning international charter flights.

Regarding LCC international flights, the number of flights for East Asia and ASEAN countries / regions has rapidly increased since 2010. (Fig. I-35)

Fig. I-35 Change in the Number of LCC International Flights



(Note)

- 1 Compiled by the JTA based on February issues of JTB timetables from 2008 to 2013.
- 2 LCC is an abbreviation for Low Cost Carrier, which provides service with lower airfares compared to major airline companies by reducing operational cost and labor cost.
- 3 Periodic charter flights are not included. For example, if two airline companies operate on the same route, they were counted as "two".

Japan is an island country and the major route for foreigners to visit Japan is by air. Therefore, the enhancement of airline network is considered to have a significant impact on the increase in the number of foreign visitors to Japan.

As indicated above, the rapid growth of foreign visitors since the launch of the VJ project is considered to have been realized through the combination of the Visit Japan Promotion, relaxation of visa requirements, and enhancement of the airline network, in addition to the economic growth in the neighboring countries, and economic factors such as the exchange rate.

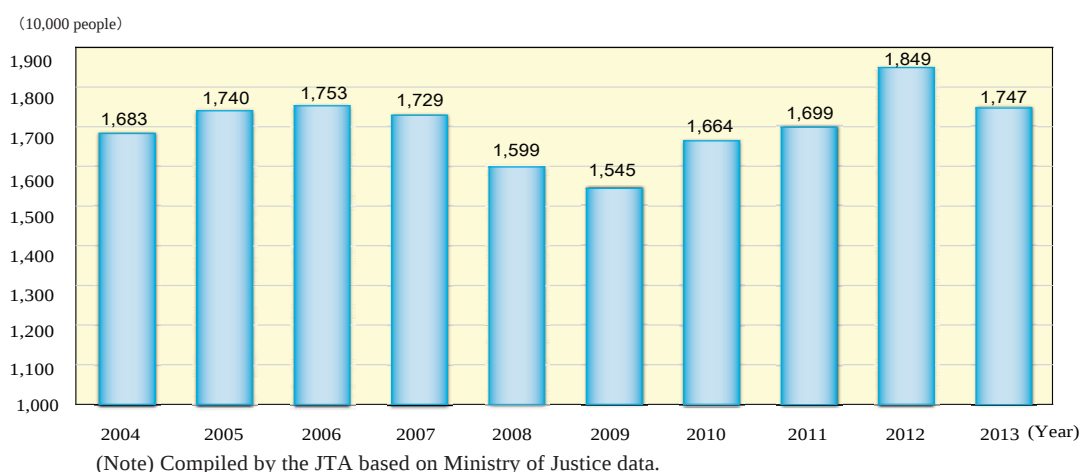
While the number of foreign visitors is significantly increasing, there is a need to encourage the dispersion of season and regions for future promotions because there is a tendency among foreign visitors to visit certain places in certain seasons.

In addition, in order to aim for the higher goal of achieving 20 million foreign visitors in 2020, backgrounds and factors for the fluctuation in the number of foreign visitors must be quantitatively analyzed, and further effective measures must be implemented based on the analysis results.

Section 3 The Foreign Travel Situation

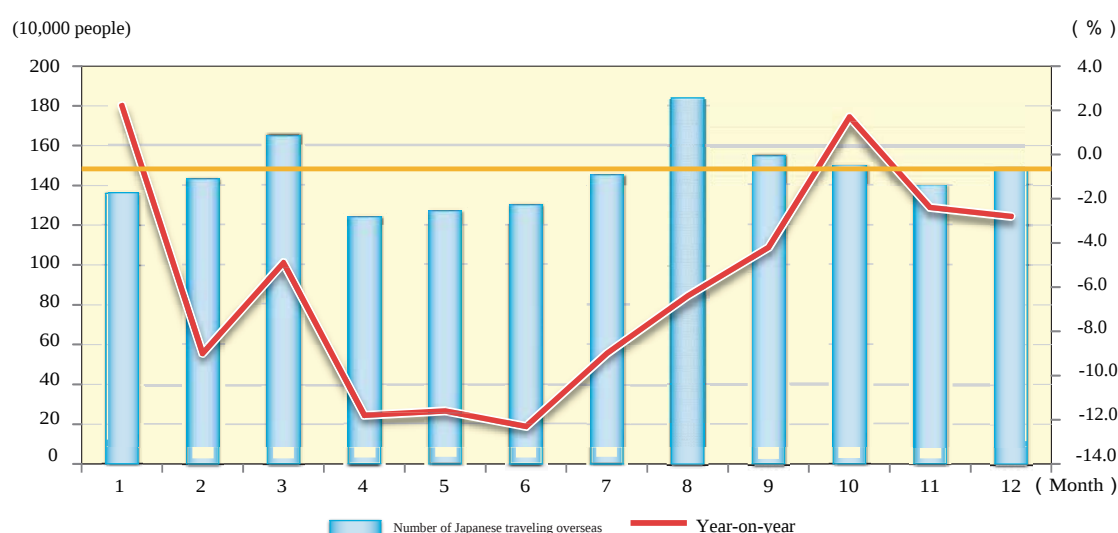
The number of Japanese traveling overseas in 2013 fell to 17.47 million (a year-on-year decrease of 5.5%) for the first time in four years after achieving the highest number of travelers in the previous year. This was due to the impact from recent issues in Japan-China and Japan-Korea relations as well as the yen depreciation generating an expensive feeling of cost including travel and local shopping. (Fig. I-36)

Fig. I-36 Change in the Number of Japanese Traveling Overseas



When looking at the values by month, the year-on-year values were negative except for January and October. (Fig. I-37)

Fig. I-37 Change in the Number of Japanese Traveling Overseas by Month (2013)



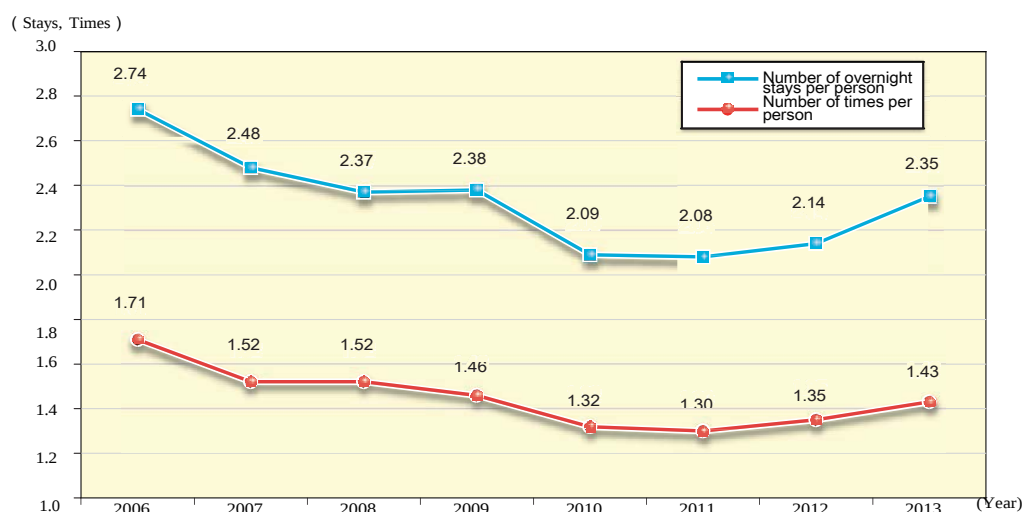
Decrease in the number of Japanese traveling overseas by country / region in 2013 was seen in China and South Korea, which decreased by 640,000 (a year-on-year decrease of 18.2%) and 770,000 (a year-on-year decrease of 21.9%) people, respectively, adding up to 1.41 million people. On the other hand, there are countries that have increased such as Thailand (a year-on-year increase of 12.0%), Malaysia (9.2% increase), and Vietnam (9.2% increase), etc.

Section 4 The Domestic Travel Situation

The number of domestic overnight trips taken by Japanese citizens per capita in 2013 was 1.43 times (a year-on-year increase of 5.9%; preliminary value). Meanwhile the number of overnight stays on domestic trips taken by Japanese citizens per capita was 2.35 nights (a year-on-year increase of 9.8%; preliminary value). The number of domestic overnight trips and the number of overnight stays on domestic trips taken by Japanese citizens per capita has been decreasing until 2011 but has been on the increasing trend since then. (Fig. I-38)

The transition of travelers from overseas to domestic travel due to the impact from recent issues in Japan-China and Japan-Korea relations as well as the yen depreciation generating an expensive feeling of travel cost is considered to have been a major factor. Events such as the recognition of the Shikinen Sengu of Ise Jingu and Mt. Fuji as World Heritage sites, etc., has contributed to generating domestic travel demands.

Fig. I-38 Change in the Number of Domestic Overnight Trips Taken and the Number of Overnight Stays by Japanese Citizens (2013)

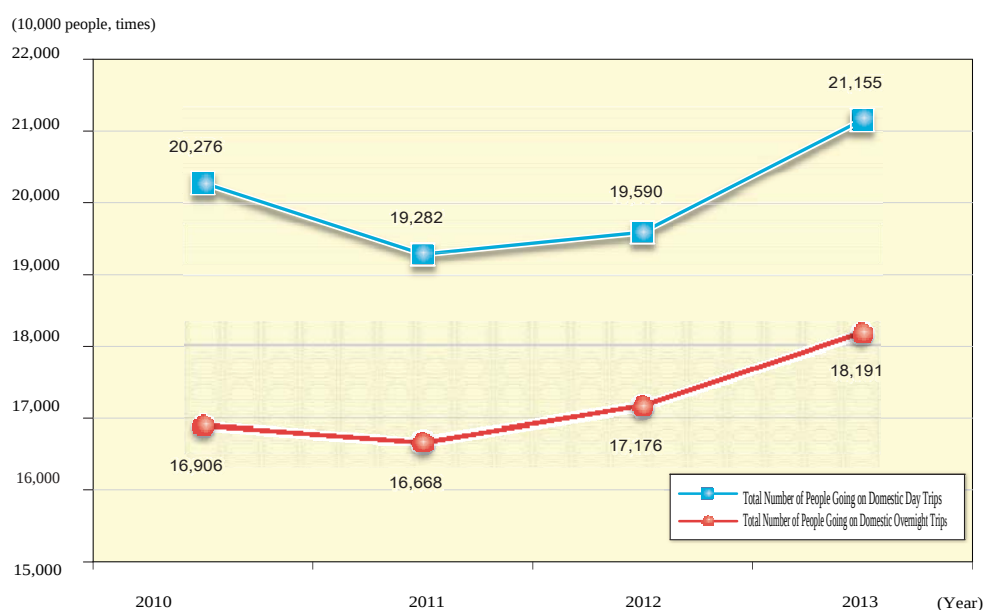


(Note)

- 1 Compiled by the JTA based on the "Survey on Travel / Tourist".
- 2 Data of 2013 are preliminary.

The number of same-day trips was 211.55 million times (a 8.0% increase), and overnight trips was 181.91 million times (a 5.9% increase), which has been increasing since 2011. (Fig. I-39)

Fig. I-39 Change in Total Number of People Going on Domestic Same-Day Trips and Overnight Trips

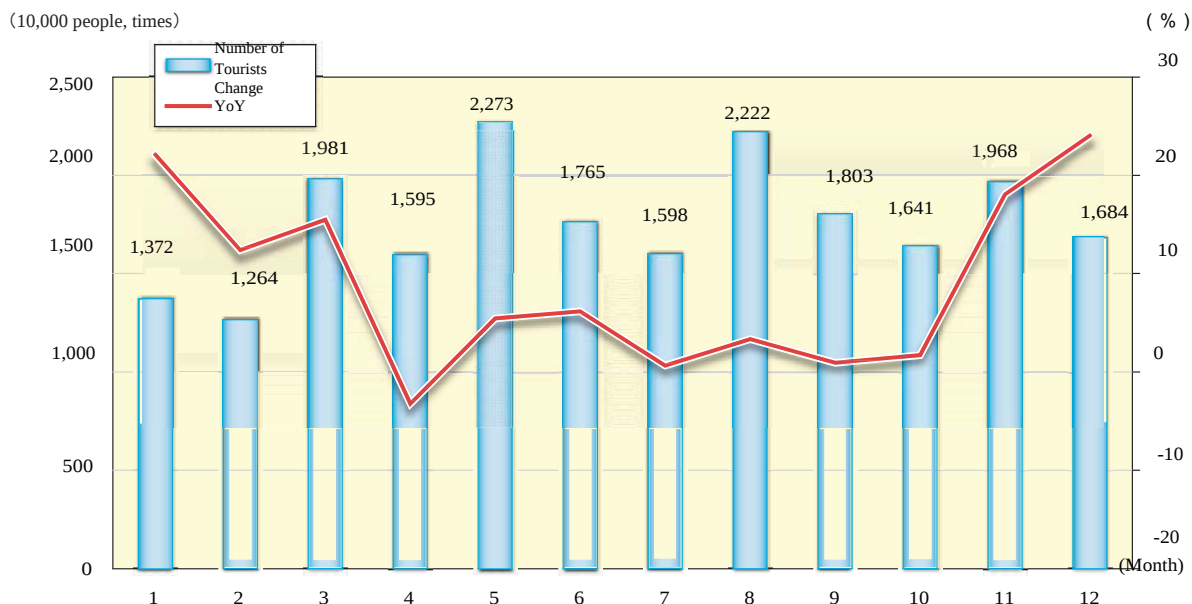


(Note)

- 1 Compiled by the JTA based on the "Survey on Travel / Tourist".
- 2 Data of 2013 are preliminary.

Monthly change in the total number of Japanese people going on domestic same-day trips indicates a high growth exceeding a year-on-year of 10% in January to March, November and December. (Fig. I-40)

Fig. I-40 Monthly Change in the Total Number of Japanese People Going on Domestic Same-Day Trips (2013)

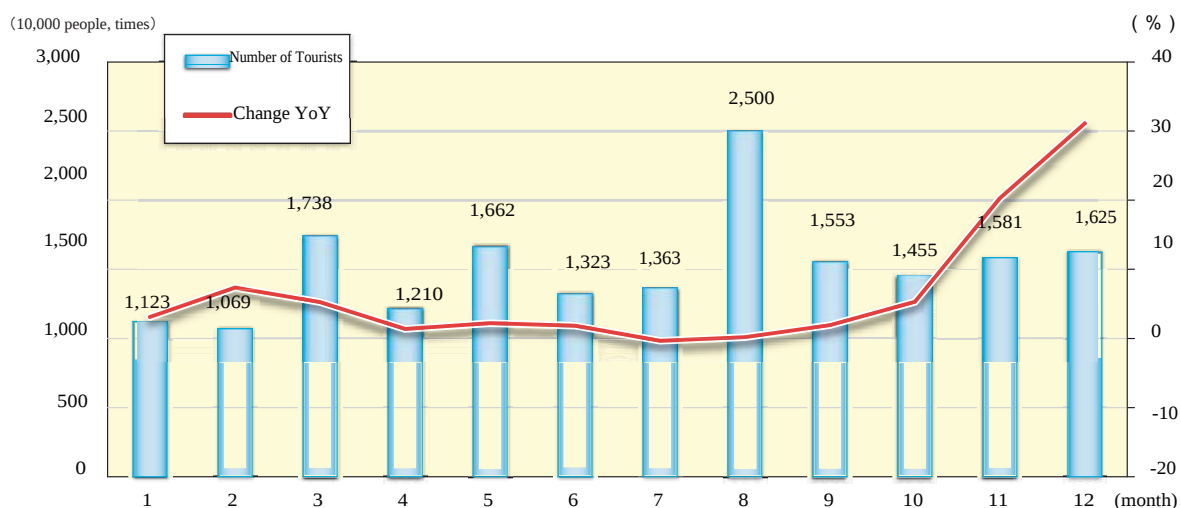


(Note)

- 1 Compiled by the JTA based on the "Survey on Travel / Tourist".
- 2 Data of 2013 are preliminary .

Monthly change in the total number of Japanese people going on domestic overnight trips indicates a high growth exceeding a year-on-year of 20% in November and December. (Fig. I-41)

Fig. I-41 Monthly Change in the Total Number of Japanese People Going on Domestic Overnight Trips (2013)



(Note)

- 1 Compiled by the JTA based on the "Survey on Travel / Tourist".
- 2 Data of 2013 are preliminary.

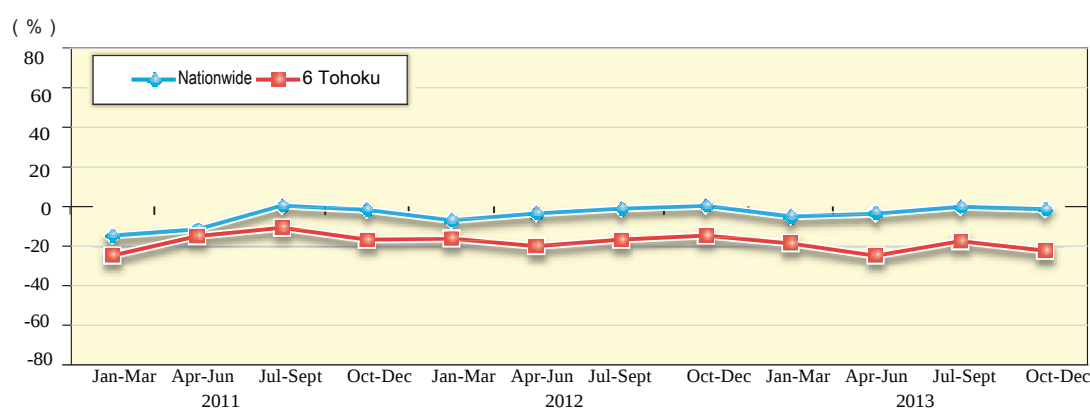
Section 5 Situation of Recovery from the Great East Japan Earthquake

The progress of recovery from the great East Japan earthquake in the Tohoku region can be determined by comparing the 2011 to 2013 data on the number of overnight guests nationwide and in the six Tohoku prefectures (Aomori, Iwate, Miyagi, Akita, Yamagata, Fukushima) with those of before the earthquake in 2010.

Firstly, the total number of Japanese overnight guests at tourist-oriented accommodation facilities in the six Tohoku prefectures for every period after 2011 is stagnating around a negative 20% in comparison to 2010, indicating the level before the earthquake has not been regained yet. Meanwhile, the nationwide values have recovered to the 2010 level in the period of July to September 2011, and have been subsequently steady around the same level.

From the above, the slow recovery of the six Tohoku prefectures compared to nationwide can be suggested with regard to the overnight stays by Japanese citizens. (Fig. I-42)

Fig. I-42 Total Number of Japanese Overnight Guests at Tourist - Oriented Accommodation Facilities (2011 to 2013 compared to the same months in 2010)



(Note)

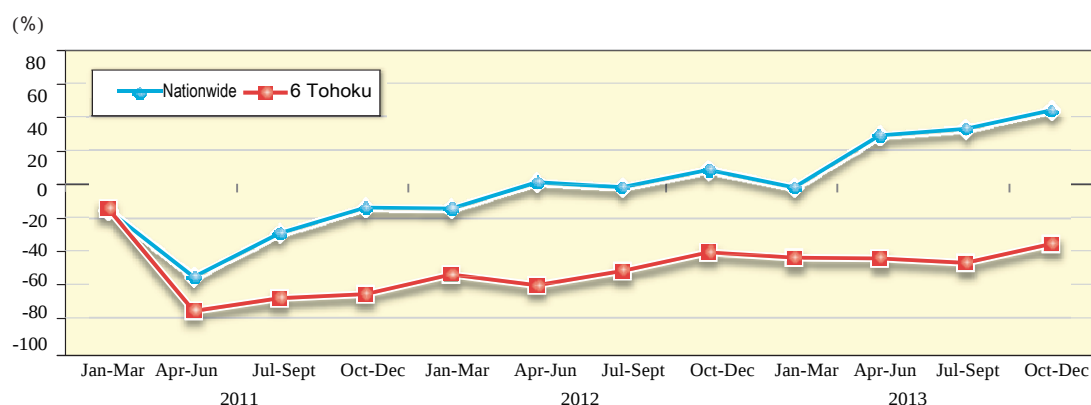
- 1 Data based on the JTA's "Accommodation Survey."
- 2 For calculating values for the same month of 2010, results of accommodation facilities with 10 or more employees were used for Jan-Mar, and results for all facilities were used for Apr-Dec.
- 3 Definite values were used for 2010 to 2012, and preliminary values were used for 2013.

Next, the total number of foreign overnight guests at tourist-oriented accommodation facilities nationwide has recovered to the 2010 level in the period of April to June 2012, and has been increasing since then.

On the contrary to a favorable nationwide trend, a significant delay in recovery has been observed in the six Tohoku prefectures. Although Tohoku was on a recovering trend in the period from April to June 2011, in October to December 2013 a negative level of 40% in comparison to the same period of 2010 was recorded.

From the above, the slow recovery of the six Tohoku prefectures compared to nationwide can be suggested with regard to the overnight stays by foreign visitors. (Fig. I-43)

Fig. I-43 Total Number of Foreign Overnight Guests at Tourist - Oriented Accommodation Facilities
(2011 to 2013 compared to the same term in 2010)

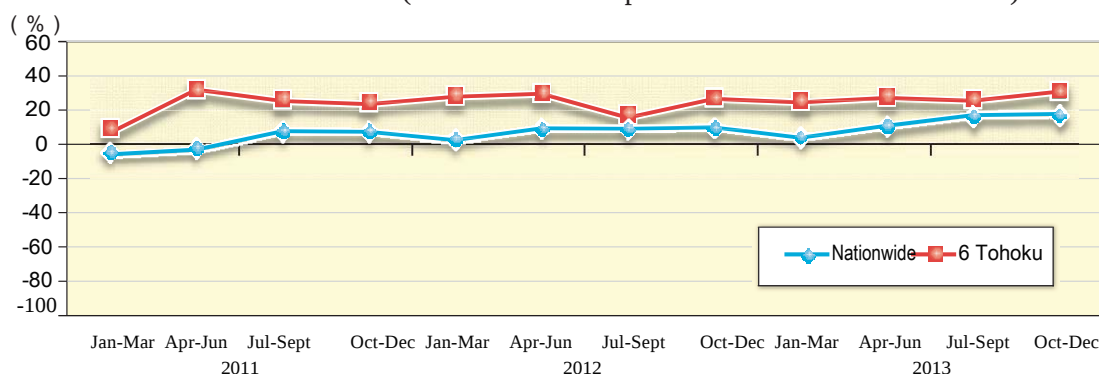


(Note)

- 1 Data based on the JTA's "Accommodation Survey."
- 2 For calculating values for the same month of 2010, results of accommodation facilities with 10 or more employees were used for Jan-Mar, and results for all facilities were used for Apr-Dec.
- 3 Definite values were used for 2010 to 2012, and preliminary values were used for 2013.

On the other hand, the total number of overnight guests at business person oriented accommodation facilities in the six Tohoku prefectures are above the national level with continuous recovery-related demands. (Fig. I-44)

Fig. I-44 Total Number of Overnight Guests at Business Person Oriented Accommodation Facilities (2011 to 2013 compared to the same month in 2010)



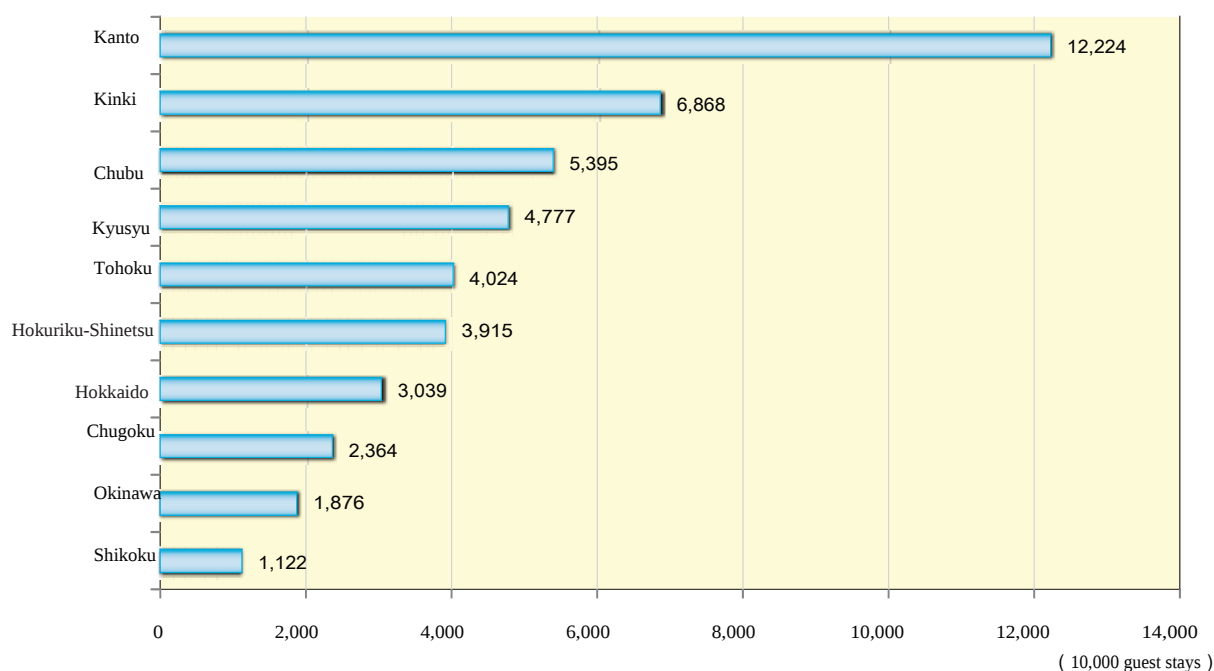
(Note)

- 1 Data based on the JTA's "Accommodation Survey."
- 2 For calculating values for the same month of 2010, results of accommodation facilities with 10 or more employees were used for Jan-Mar, and results for all facilities were used for Apr-Dec.
- 3 Definite values were used for 2010 to 2012, and preliminary values were used for 2013.

Section 6 The Tourism Situation in Regional Areas

The total number of nationwide accommodation guests in 2013 was 456.05 million guest stays (a year-on-year increase of 8%). When looking at the above value in terms of regional blocks, the top three were Kanto region (122.24 million guest stays (26.8% of total)), Kinki region (68.68 million guest stays (15.1% of total)), and Chubu region (53.95 million guest stays (11.8% of total)). (Fig. I-45)

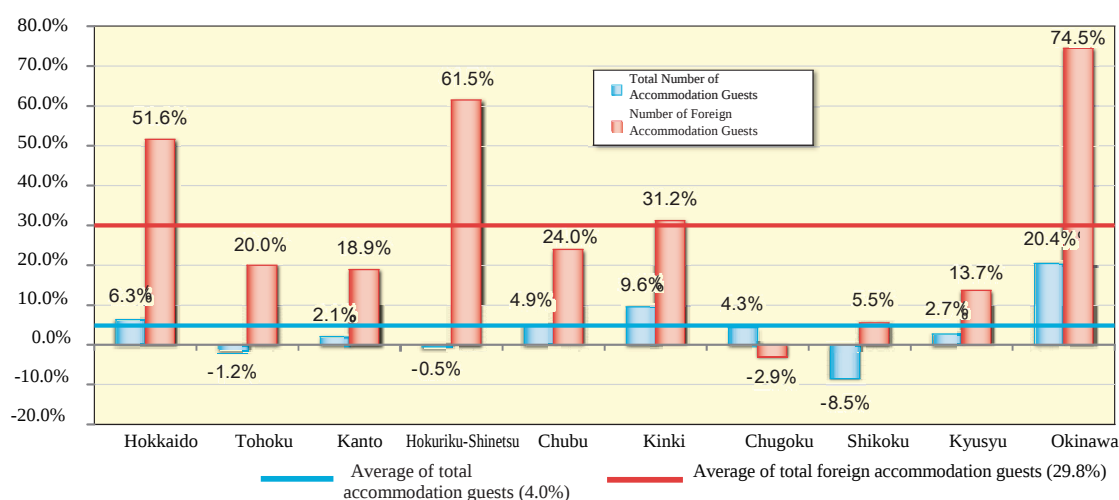
Fig. I-45 Accommodation Guests by Regional Blocks (2013)



With regard to the year-on-year comparison of the total number of accommodation guests by regional blocks in 2013, Okinawa (a 20.4% increase), Kinki region (a 9.6% increase) and Hokkaido (a 6.3% increase) ranked top three whereas decline was observed in Shikoku, Tohoku and Hokuriku - Shin'etsu regions.

As for the year-on-year comparison of the total number of foreign accommodation guests by regional block in 2013, except for Chugoku region with a decrease of 2.9%, increase was observed in all regions and there were especially large increases in Okinawa (a 74.5% increase), Hokuriku - Shin'etsu regions (a 61.5% increase), and Hokkaido (a 51.6% increase). (Fig. I-46)

Fig. I-46 Year-on-year Comparison of the Total Number of Accommodation Guests and the Number of Foreign Accommodation Guests by Regional Blocks (2013)



(Note) 1 Data based on the JTA's "Accommodation Survey."
2 Data of 2013 are preliminary .

Regional blocks are analyzed as follows.

1 Hokkaido

Holding events that attract visitors such as popular rock band concerts, Hokkaido shinkansen-related construction work, and new expanded services of LCCs has contributed to the increase in total number of accommodations guests.

The daily operation of direct flights between the New Chitose Airport and Bangkok and the popularity of Niseko area is considered to have contributed to the increase in total number of foreign accommodation guests..

2 Tohoku

Demand related recovery from the Great East Japan Earthquake accounts for a large portion of the total number of accommodation guests and so the demand of accommodation for tourism purposes has not been regained yet before the earthquake .

Although the total number of foreign accommodation guests is on a recovering trend, the pace is very slow with harmful rumors strong in some areas such as South Korea.

3 Kanto

With the damage due to bad rumors of the great East Japan Earthquake slightly remaining, the total number of foreign accommodation guests have shown an increase owing to the domestic and overseas attention gained from the recognition of Mt. Fuji as a World Heritage site and the news of hosting the Tokyo 2020 Olympics and Paralympic Games..

4 Hokuriku - Shinetsu

The increase in the total number of foreign accommodation guests is attributable to the popularity of the Tateyama Kurobe Alpine Route (Taiwan, Southeast Asia), and ski resorts such as Hakuba, Shiga, Nozawa, and Myoko (Austria).

5 Chubu

The promotion of attraction by the Shoryudo Project contributed to the increase of total number of foreign accommodation guests.

6 Kinki

The expansion of LCC services based at Kansai International Airport contributed to the increase of total number of foreign accommodation guests.

7 Chugoku

The JR West Destination Campaign implemented in Hiroshima from July to September 2013 and the Honden Senza-sai of Izumo Taisha Grand Shrine which is an event about renovation work on the main hall at about once every 60 years are considered to have contributed to the increase in total number of accommodation guests.

8 Shikoku

Despite the temporal increase of visitors by holding the Setouchi Triennale 2013, the total number of accommodation guests fell with the effects of extremely hot summer, typhoons and the torrential and heavy rains due to the autumn rain front.

Regarding the total number of foreign accommodation guests, regular flights from Taiwan to Takamatsu, LCC services from Narita to Takamatsu and Matsuyama, the Setouchi Triennale 2013, and the popularity of a Shikoku sightseeing tour using the ALL SHIKOKU Rail Pass are contribution factors.

9 Kyushu

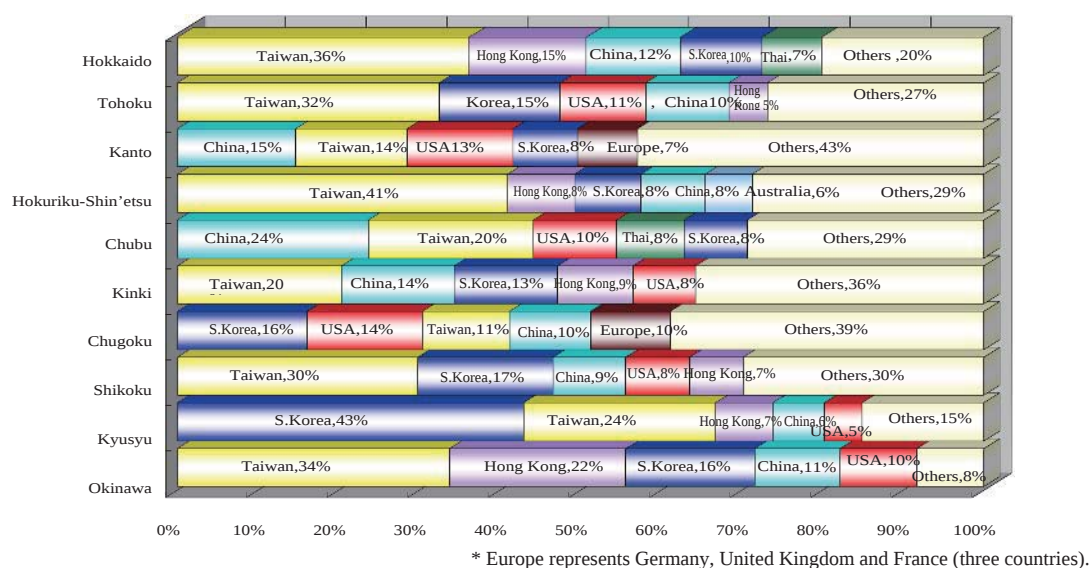
Tourism exchange with ASEAN member countries and South Korea as well as promoting the appeal to tourists has contributed to the increase in total number of foreign accommodation guests.

10 Okinawa

The opening of the Painushima Ishigaki Airport with expanded airline routes have contributed to the increase in total number of accommodation guests. New international terminals at Naha Airport and cruise passenger terminals at the Naha Port, as well as the associated expansion of airline routes and port of call by cruise ships has contributed to the increase in total number of foreign accommodation guests.

Regarding the share of foreign accommodation guests by nationality and region for each regional block in 2013, Hokkaido, Tohoku region, Hokuriku - Shin'etsu region, Kinki region, Shikoku region and Okinawa received many accommodation guests from Taiwan, Chugoku region and Kyushu region received many guests from South Korea, and Kanto region and Chubu region received many guests from China. (Fig. I-47)

Fig. I-47 Share of Foreign Accommodation Guests by Nationality and Region for Each Regional Block and in 2013



(Note)
1 Data based on the JTA's "Accommodation Survey."
2 Data of 2013 are preliminary .

Section 7 Tourism Promotion in Regional Areas

Initiatives to appeal for domestic and overseas tourists and to promote tourist regions is implemented nationwide. Initiatives taken by regional blocks are introduced as follows.

1 Hokkaido

Initiatives to ensure the collaboration of transportation that supports regional life and tourism exchange will be implemented in addition to promotion of sports tourism and maintenance of a receptive environment for Muslims and so on based on the Hokkaido Tourism Promotion Strategy formulated in 2012.

○ Foreign student ski instructor development project

In November 2013, the "Omotenashi Snow Leisure" development team was organized jointly by the government, industry and academia including the Hokkaido District Transport Bureau, Ski Association of Hokkaido, Hokkaido Ski Overseas Promotion Association (NPO), Sapporo University, etc., to foster foreign students in Hokkaido as ski instructors.



Logo created for the project

There were 28 foreign student applicants from four countries and regions (China, Taiwan, South Korea,



Foreign students taking lessons from an instructor

Bangladesh) for this project. Out of 18 participants, 11 passed the 2nd level test conducted by the Ski Association of Japan, and 6 passed the examination for certified instructors.

These students are destined to work as ski instructors in Sapporo and Rusutsu, etc. in the future, which will lead to increase travel demand for skiing in Hokkaido by improving system of lessons for foreigners and spreading information through social media.

○ Promotion of remote island tourism

In order to promote remote islands by tourism and transportation, the Hokkaido District Transport Bureau, municipalities, transportation businesses, and travel agencies, etc. incorporated to make travel products using public transportations (products combining ferry bus and accommodation) targeting individuals and small groups were produced in May 2013. As a result, users of sea routes to remote islands in Hokkaido increased 1.9% (12,567 people) compared to the previous year.

2 Tohoku

Although three years have passed since the great East Japan earthquake, recovery of tourists, especially foreign visitors, in the Tohoku region is delayed. For this reason, the Tohoku District Transport Bureau, local governments, tourism businesses, community, etc. jointly promoted initiatives for the early recovery and expansion in tourism in the Tohoku region.

○ Reconstruction and revitalization of tourism in Tohoku region

With the "Reconstruction and revitalization of tourism in Tohoku region" as a theme, various media and

events jointly implemented initiatives such as the "recovering shopping district traveling stamp rally", the opening and operating of a portal site, "Tohoku monogatari" that disseminates updated information on regional tourism, the "We support tourism in Tohoku!! ~ 3 years since the great East Japan earthquake~ "symposium" in which the six prefectural governors participated, etc.

With regard to the "recovering shopping district traveling stamp rally", the number of entries rose from 880 to 5,203, which lead to raising awareness and travel demands of the Pacific coast area. Also, the attitude of making effort to reconstruct and develop tourism in the Tohoku area as a whole was disseminated to domestic and overseas at the symposium. In addition, through publicizing the "TOHOKU JAPAN" logo created for the purpose of events to attract foreign visitors along with the symposium, the cooperation with relevant institutions was deepened.

3 Kanto

With the opportunity of the registration of Mt. Fuji as a World Heritage site in June 2013, initiatives were promoted based on cooperation with the region to develop appealing tourist regions and to attract foreign visitors .

○Initiatives to attract foreign visitors utilizing the registration of Mt. Fuji as a World Heritage site

With aim to disseminate the appeal of Mt. Fuji worldwide, and to raise awareness attract tourists to Japan and the Fuji-Hakone-Izu area, an invitation project was conducted in July 2013 targeting American and French media, where there are needs for historical and cultural tourism resources of Mt. Fuji to increase foreign visitors from Europe and the United States .

Through this initiative, local breweries and shrines in the periphery of Mt. Fuji have been highly evaluated as tourism resources that create motives for visiting along with Mt. Fuji..

○Development of an appealing tourist region utilizing the registration of Mt. Fuji as a World Heritage site

The Mt. Fuji international Nordic association and the Fujikawaguchiko machi jointly promote town development with the region through Nordic walking in which Mt. Fuji can be enjoyed in four seasons as well as the historical and cultural assets in the background.

4 Hokuriku - Shin'etsu

In spring 2015, the Hokuriku Shinkansen will be extended to Kanazawa, which largely reduces the travel time to the Hokuriku - Shin'etsu region from the metropolitan and Kansai area. This will promote interregional exchange in various fields. Initiatives to revitalize regional tourism by taking advantages of the opening of the Hokuriku



"Recovering shopping district traveling stamp rally" posters



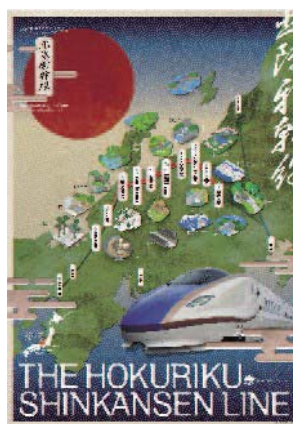
We support tourism in Tohoku!! symposium

Shinkansen were taken in cooperation with the Hokuriku-Shin'etsu District Transport Bureau, local governments, and tourism / transportation businesses, etc.

- Revitalization of regional tourism by taking advantages of the opening of the Hokuriku Shinkansen

In order to strengthen the cooperation of relevant persons, the "Tourism promotion symposium towards the extension of Hokuriku Shinkansen to Kanazawa" (July 2013), and the "Kagayaki / hakutaka Tourism Conference" (November 2013)

by the six prefectures along the route, tourism and JR related persons were held. In addition, specific initiatives for promotions and information dissemination involving a wide area were implemented.



Tourist map for the Hokuriku Shinkansen route

5 Chubu

Aiming for reaching 6 million foreign visitors, , initiatives were promoted to further attract Chinese tourists, which account for the most visitors to the Chubu region, to implement promotion involving wide area, to maintain free public wireless LAN environments, to enhance Muslim friendly environments, and to improve access between Chubu Centrair International Airport and tourist areas.

- Promotion to further attract Chinese tourists (promotion of the "Shoryudo Project")

In order to promote the attraction of Chinese tourists (from China, Hong Kong, Taiwan) to Chubu and Hokuriku regions, a "Shoryudo Project Promotion Council" was established in March 2012, a "Shoryudo Taiwan Mission" team was dispatched to Taiwan (May 2013), a "Shoryudo Project

Action Plan" was formulated (September 2013), multilingual travel guides were created and distributed, and "Shoryudo welcome cards" with privileges were distributed to foreign visitors.



A poster for "Shoryudo project"

6 Kinki

Initiatives related to the tourism promotion and social infrastructure maintenance in Kii Peninsula were promoted by relevant institutions and local governments on purpose of the early recovery and reconstruction from Typhoon No. 12 which inflicted severe damage in September 2011.

- Promotion of tourism and social infrastructure maintenance in Kii Peninsula

The nation (Kinki District Transport Bureau, Kinki Regional Development Bureau, Kinki Regional Agricultural Administration Office, etc.) and local governments (Mie Prefecture, Nara Prefecture, Wakayama Prefecture, etc.) worked together to hold a " liaison meeting regarding tourism promotion and social infrastructure maintenance in Kii Peninsula" (November 2012). In addition, in FY2013, a brochure, "Closer to Kii Peninsula", relating to tourism resources and social infrastructure maintenance of Kii Peninsula was created and distributed and promoted at events.



"Kii Peninsula Tourism PR Exhibition" held at JR Osaka Station



PR brochure, "Closer to Ki Peninsula"

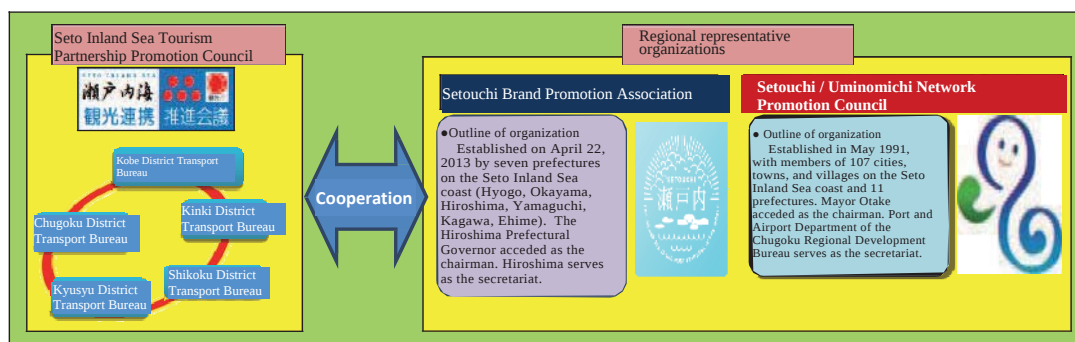
7 Chugoku / Shikoku

Development of appealing regions with tourism resources of the Seto Inland Sea and initiatives towards the revitalization of regional economy were implemented in cooperation with multiple transport bureaus and local governments.

○ Promotion of Seto Inland Sea tourism

In July 2013, a "Seto Inland Sea Tourism Partnership Promotion Council" was established, model route investigations were implemented for creating a Seto Inland Sea sightseeing route, "Seto Inland Sea Cruise Seminar" (October 2013) was held to attract the port of call to Seto Inland Sea by cruise ships, and the usage of "Setouchi Cycruise Pass" was promoted.

Through these initiatives, the number of "Setouchi Cycruise Pass" issued increased 5.6% year-on-year.



Structure of Seto Inland Sea Promotion

8 Kyushu

Initiatives have been implemented to promote the attraction of tourists from the ASEAN market and South Korea, maintain receptive environments for foreign visitors focused on the access of Fukuoka Airport, which is Kyushu's main entrance, and develop an appealing tourist region that will be favored by domestic and foreign visitors. .

○ Promotion to attract tourists from ASEAN with remarkable economic growth

"Symposium on mutual tourism exchange between Thailand and Kyushu" was held to promote the exchange between Thailand and Kyushu (May 2013). In addition, public and private sectors worked together to support the execution of a memorandum in regard to the tourism exchange promotion between the Japan Association

of Travel Agents (JATA) Kyushu Branch and the Association of Thai Travel Agents (TTAA), to implement a two-way traffic flow, and to hold travel seminars in Thailand.

Through these initiatives, visitors from ASEAN increased in 2013, especially, visitors from Thailand recorded the highest in history.



Symposium on mutual tourism exchange between Thailand and Kyushu

○ Promotion to attract tourists from South Korea

While the number of tourists visiting Japan from South Korea decreased in the end of 2013, a campaign for Korean tourists visiting Kyushu was implemented in cooperation with the Kyushu District Transport Bureau, Fukuoka City, and Toyota Rent A Car Fukuoka to maintain and increase inbound travelers from South Korea as an emergency measure towards achieving 10 million foreign visitors..

Through this initiative, the number of visitors from South Korea recorded the highest in history for two consecutive years in 2013..

9 Okinawa

By utilizing new transportation infrastructure such as the opening of new Painushima Ishigaki Airport (March 2013), commencement of services in new international terminals at Naha Airport (February 2014) and in cruise passenger terminals at the Naha Port, promotions towards ASEAN member countries were strengthened and relevant persons were invited to attract cruise ships in order to further attract foreign visitors.

○ Promotion to attract cruise ships

In September 2013, the vice president of Silversea Cruises of the United States was invited and presentations were given on the appeal of the main island of Okinawa, Miyakojima, and Ishigakijima as port of call destinations.

The Okinawa General Bureau and Okinawa Prefecture, etc. jointly held the "Cruise Symposium in Okinawa" (December 2013) where all persons involved in promoting cruises in Japan and Taiwan participated.

Through these initiatives, 167 port of calls of cruise ships to Okinawa is scheduled for 2014, of which 97 are at Naha Port, and 67 are at Ishigaki Port, both expected to be the highest in history.



New international terminals at Naha Airport Cruise



Cruise passenger terminals at the Naha Port (Photograph provided by the Naha Port Authority)



(Note) In this section, the regions referred to are those falling under the jurisdictions of the respective District Transport Bureaus, etc.

Tohoku district (Aomori Prefecture, Iwate Prefecture, Miyagi Prefecture, Akita Prefecture, Yamagata Prefecture, Fukushima Prefecture)

Kanto district (Ibaraki Prefecture, Tochigi Prefecture, Gunma Prefecture, Saitama Prefecture, Chiba Prefecture, metropolitan Tokyo, Kanagawa Prefecture, Yamanashi Prefecture)

Hokuriku Shin'etsu district (Niigata Prefecture, Toyama Prefecture, Ishikawa Prefecture, Nagano Prefecture)

Chubu district (Fukui Prefecture, Gifu Prefecture, Shizuoka Prefecture, Aichi Prefecture, Mie Prefecture)

Kinki district (Shiga Prefecture, metropolitan Kyoto, metropolitan Osaka, Nara Prefecture, Wakayama Prefecture)

Chugoku district (Tottori Prefecture, Shimane Prefecture, Okayama Prefecture, Hiroshima Prefecture, Yamaguchi Prefecture)

Shikoku district (Tokushima Prefecture, Kagawa Prefecture, Ehime Prefecture, Kochi Prefecture)

Kyushu district (Fukuoka Prefecture, Saga Prefecture, Nagasaki Prefecture, Kumamoto Prefecture, Oita Prefecture, Miyazaki Prefecture, Kagoshima Prefecture)

Appendix

Data 1
Foreign Tourists and International Tourism Revenue by Region

(Upper box: 10,000 persons; Lower box: Millions of US dollars)

Year	2011			2012		
	Foreign tourists	Change YoY	Share	Foreign tourists	Change YoY	Share
Region	International tourism revenue			International tourism revenue		
Europe	51,641	6.4%	51.9%	53,417	3.4%	51.6%
	466,722	13.3%	44.8%	457,832	-1.9%	42.6%
Americas	15,596	3.7%	15.7%	16,312	4.6%	15.8%
	197,944	9.5%	19.0%	212,623	7.4%	19.8%
Asia - Pacific	21,821	6.4%	21.9%	23,356	7.0%	22.6%
	298,614	17.2%	28.6%	323,865	8.5%	30.1%
Africa	4,944	-0.8%	5.0%	5,236	5.9%	5.1%
	32,705	7.2%	3.1%	33,585	2.7%	3.1%
Middle East	5,494	-5.6%	5.5%	5,199	-5.4%	5.0%
	46,442	-11.1%	4.5%	47,031	1.3%	4.4%
Total	99,496	4.8%	100.0%	103,520	4.0%	100.0%
	1,042,427	12.0%	100.0%	1,074,936	3.1%	100.0%

(Note) Data from the UNWTO's "Tourism Highlights 2013".

YoY means "year on year".

Data 2
Balance of Payments on International Tourism (2012)

(Millions of US dollars)

	Revenues	Expenditures	Balance
United States	128,555	83,700	44,855
Spain	55,916	15,300	40,616
Thailand	30,092	6,100	23,992
France	53,697	37,200	16,497
Italy	41,185	26,200	14,985
Hong Kong	31,680	20,500	11,180
Australia	18,894	10,100	8,794
Malaysia	19,703	12,000	7,703
India	17,971	12,300	5,671
Mexico	12,720	8,400	4,320
Australia	31,534	27,600	3,934
Poland	10,938	8,700	2,238
Switzerland	16,581	14,400	2,181
Indonesia	8,342	6,800	1,542
Taiwan	11,707	10,600	1,107
Sweden	15,429	16,100	-671
Singapore	19,261	22,400	-3,139
United Arab Emirates	(9,204)	(13,200)	-3,996
South Korea	14,231	20,100	-5,869
Netherlands	13,887	20,200	-6,313
Saudi Arabia	7,432	17,000	-9,568
Belgium	11,381	21,700	-10,319
Japan	14,576	27,900	-13,324
Brazil	6,645	22,200	-15,555
United Kingdom	36,373	52,300	-15,927
Canada	17,363	35,200	-17,837
Russia	11,187	42,800	-31,613
Germany	38,114	83,800	-45,686
China	50,028	102,000	-51,972

(Note) 1 Compiled by JTA based on data from the JNTO (source: UNWTO and each countries' national tourist organization).

2 The 2011 value was used for United Arab Emirates because its 2010 value was unclear.

Data 3 Japan's Balance of Payments on International Tourism

(100s of millions of yen)

Year		2007	2008	2009	2010	2011	2012	2013
Category								
Net balance on international tourism (not including passenger transport)	Credit	10,990	11,186	9,641	11,586	8,752	11,631	14,574
	Debit	31,189	28,818	23,527	24,462	21,716	22,248	21,456
	Net Balance	△ 20,199	△ 17,631	△ 13,886	△ 12,875	△ 12,963	△ 10,617	△ 6,882
Net balance on international tourism (including passenger transport)	Credit	14,611	14,254	11,702	13,460	9,975	12,920	16,306
	Debit	43,844	40,275	32,487	34,393	31,673	32,661	31,559
	Net Balance	△ 29,233	△ 26,019	△ 20,785	△ 20,932	△ 21,697	△ 19,741	△ 15,252
Balance of trade	Credit	716,309	797,253	773,349	639,218	627,248	614,421	669,694
	Debit	621,665	674,030	733,071	559,429	643,412	672,562	776,093
	Net Balance	94,644	123,223	40,278	79,789	△ 16,164	△ 58,141	△ 106,399

(Note) 1 Compiled by JTA based on Ministry of Finance data.

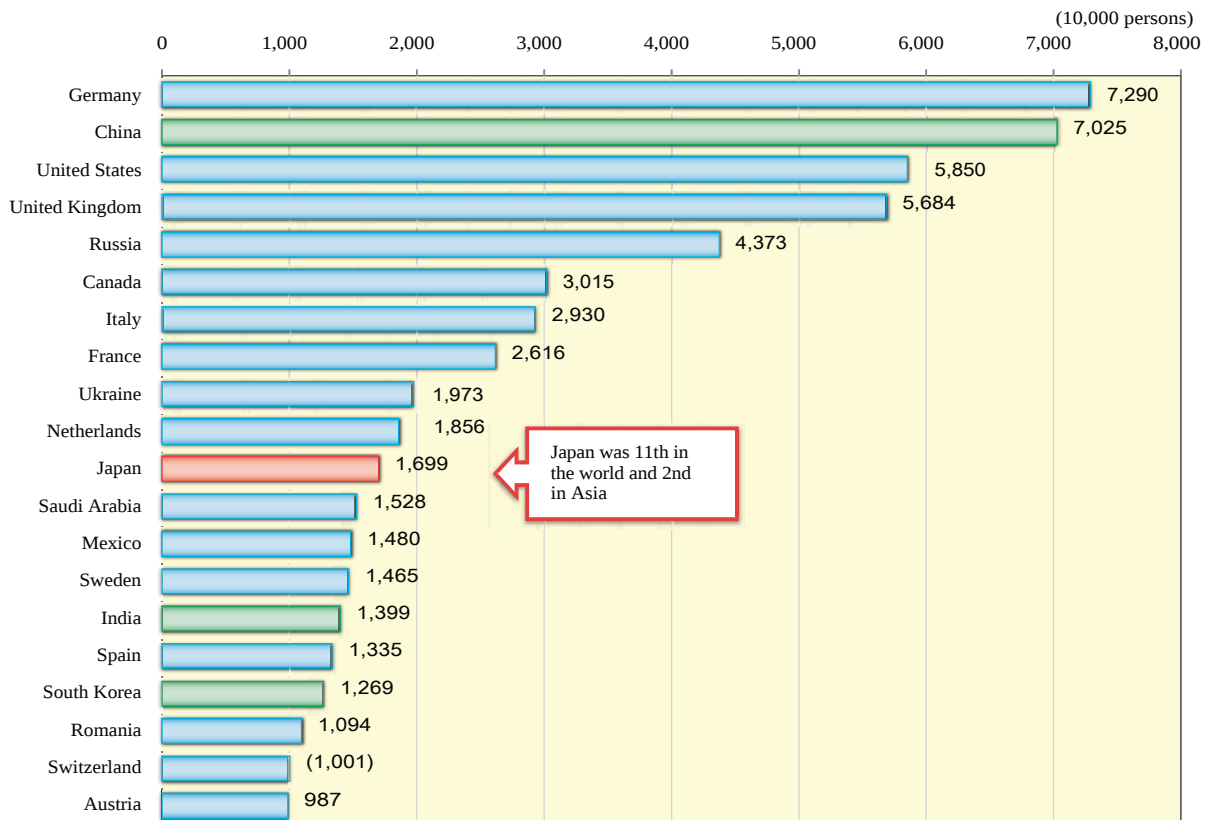
2 The "net balance on international tourism" was calculated by the JTA based on the following definition: The "net balance on international tourism" refers to the balance of travel net balance within the country's balance of payments.

The "net balance on international tourism (including passenger traffic)" is calculated by adding net balance for passenger transport within transport to net balance of tourism payments.

3 △ indicates deficit.

4 2013 data represents preliminary values.

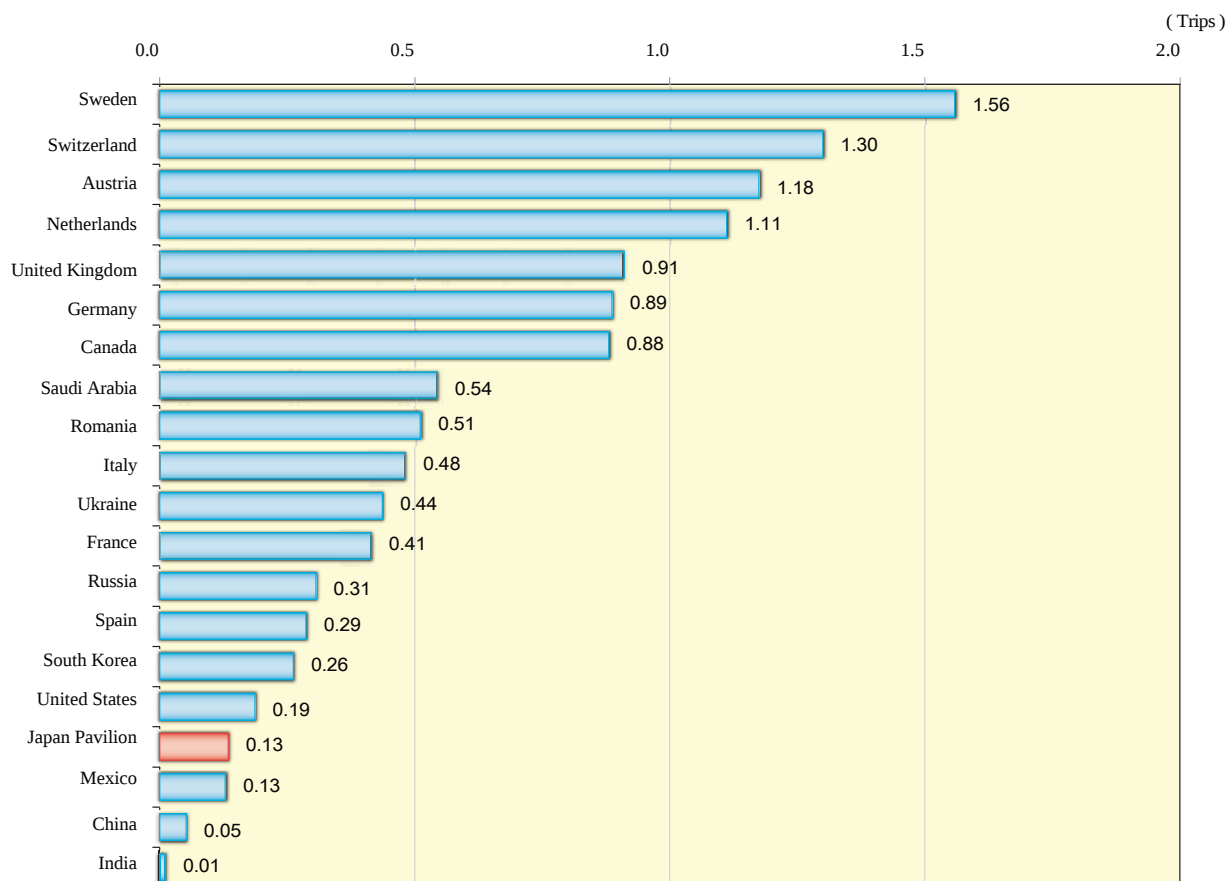
Data 4 International Outbound Traveler Rankings (2011)



(Note) 1 Compiled by JTA based on data from the JNTO (source: UNWTO and each countries' national tourist organization).

2 Data are preliminary as of June 2013 .

3 2010 data was used for Switzerland because the country has not released data for 2011.

Data 5
Number of International Trips taken per Capita by the Top 20 Countries for Outbound International Travelers (2011)


(Note) 1 Compiled by JTA based on data from the JNTO (source: UNWTO and each countries' national tourist organization), and on white paper on world population from Nations Population Fund.

2 Calculated by dividing the country's population from the number of outbound international travelers.

3 Data are preliminary as of April 2013.

4 2010 data was used for Switzerland because the country has not released data for 2011.

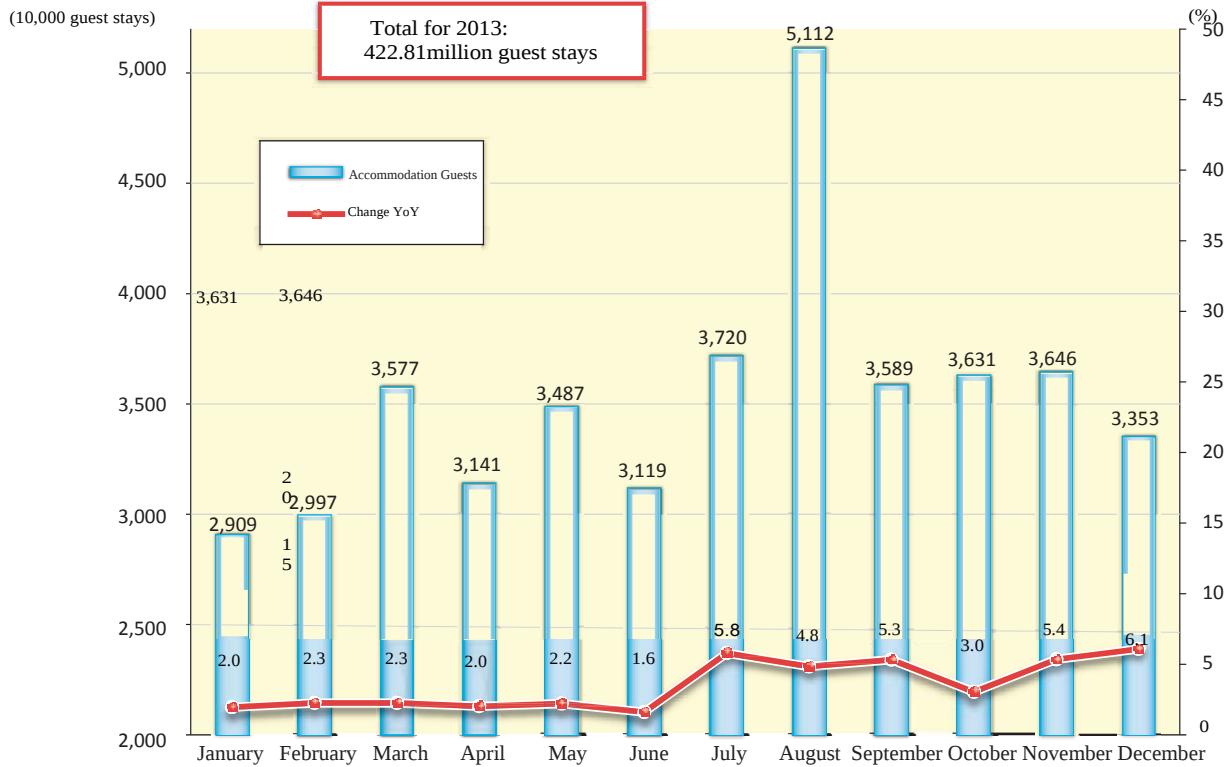
Data 6
Number of International Conferences Held in Each Country (2013)

2013 Ranking in the world	Country name	2013 Number of conferences
1	United States	829
2	Germany	722
3	Spain	562
4	France	527
5	United Kingdom	525
6	Italy	447
7	Japan	342
8	China	340
9	Brazil	315
10	Netherlands	302
11	Canada	290
12	South Korea	260
13	Portugal	249
14	Austria	244
15	Sweden	238
16	Australia	231

(Note) Compiled by the JNTO based on ICCA (International Congress and Convention Association) statistical data.

2013 Ranking of Asia-Pacific and Middle East regions	2013 Ranking in the world	Cities	2013 Number of conferences
1 位	6	Singapore	175
2 位	9	Seoul	125
3 位	18	Beijing	105
4 位	20	Bangkok	93
		Sydney	93
6 位	23	Hong Kong	89
7 位	26	Tokyo	79
8 位	28	Taipei	78
9 位	29	Shanghai	72
10 位	33	Kuala Lumpur	68
11 位	40	Bali	55
12 位	44	Melbourne	52
13 位	52	Jeju	45
14 位	55	Kyoto	43
15 位	63	Dubai	37
16 位	65	New Delhi	35
17 位	68	Pusan	34
18 位	89	Manila	28
23 位	117	Osaka	20
28 位	136	Kobe	18
30 位	148	Yokohama	17
35 位	159	Nagoya	15
42 位	182	Sapporo	13
44 位	193	Fukuoka	12
		Nara	12
55 位	242	Okinawa	9

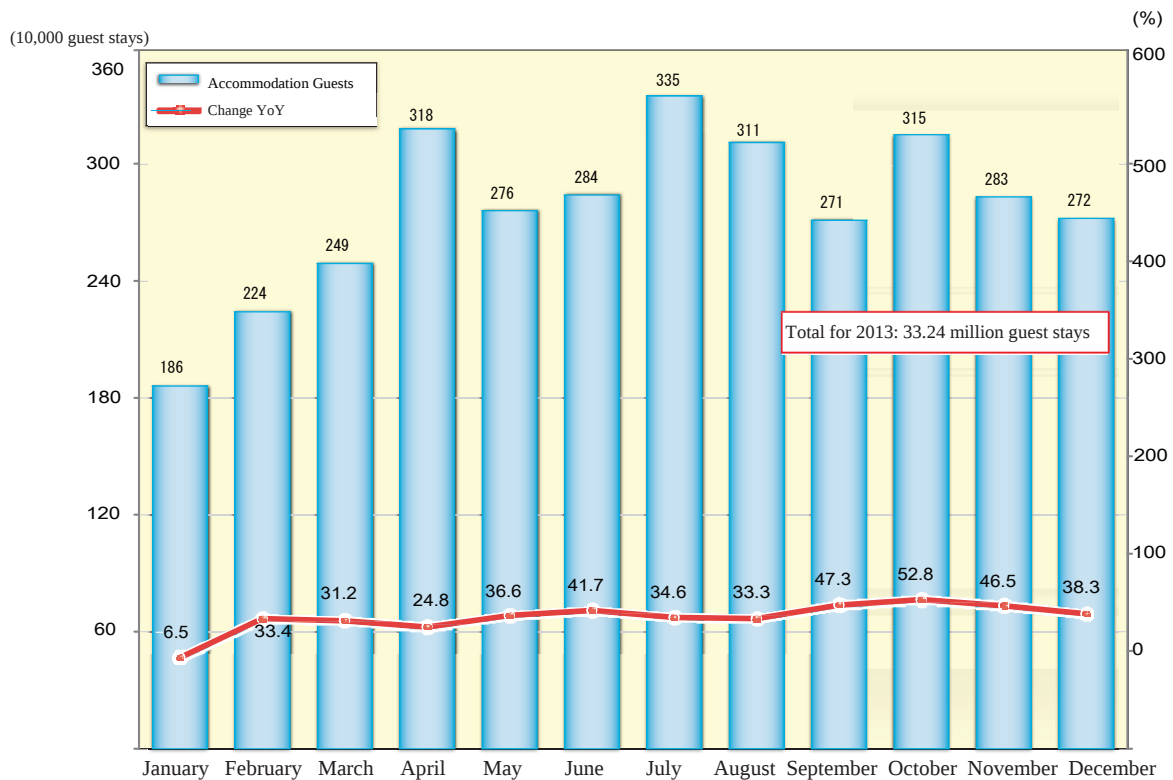
(Note) Compiled by the JNTO based on ICCA (International Congress and Convention Association) statistical data.

Data 8
Monthly Accommodation Guests - Japanese Nationals (2013)


(Notes) 1 Data based on the JTA's "Accommodation Survey."

2 Data does not reflect new openings or closures during the year. Annual revision values will vary slightly.

3 Change year-on-year created based on a statistical survey of accommodations with more than 10 employees (annual revision values for 2012 only).

Data 9
Monthly Accommodation Guests - Foreign Nationals (2013)


(Note) 1 Data based on the JTA's "Accommodation Survey."

2 "Foreign national" refers to someone that does not maintain an address in Japan.

3 Data does not reflect new openings or closures during the year. Annual revision values will vary slightly.

4 Change year on year created based on a statistical survey of accommodations with more than 10 employees (annual revision values for 2013 only).

(10,000 guest stays, %)

	Accommodation Guests	Accommodation Guests - Foreign Nationals	Bed Occupancy rate	Guestroom Occupancy rate
Nationwide	45,605	3,324	35.9%	54.6%
Hokkaido	3,039	305	37.6%	55.5%
Aomori	473	6	30.2%	47.8%
Iwate	570	6	32.2%	50.8%
Miyagi	1,077	10	42.9%	64.5%
Akita	351	4	26.7%	45.3%
Yamagata	537	3	24.2%	43.8%
Fukushima	1,017	4	27.4%	46.8%
Ibaraki	510	8	29.6%	46.5%
Tochigi	946	18	32.1%	47.1%
Gunma	847	10	28.8%	44.0%
Saitama	403	9	39.8%	61.6%
Chiba	1,979	199	48.8%	65.2%
Tokyo	5,148	998	65.6%	78.6%
Kanagawa	1,695	106	46.4%	62.3%
Niigata	965	11	21.5%	38.2%
Toyama	372	13	29.0%	49.9%
Ishikawa	726	31	36.8%	56.8%
Fukui	319	3	20.8%	33.7%
Yamanashi	695	48	22.2%	39.7%
Nagano	1,852	53	20.5%	32.7%
Gifu	602	41	28.3%	43.4%
Shizuoka	2,030	54	30.0%	47.5%
Aichi	1,462	115	44.3%	61.3%
Mie	982	12	28.7%	47.3%
Shiga	405	13	27.7%	46.1%
Kyoto	2,063	266	45.8%	67.7%
Osaka	2,409	431	68.0%	75.1%
Hyogo	1,308	49	33.0%	51.2%
Nara	236	17	21.7%	42.2%
Wakayama	447	18	24.5%	37.8%
Tottori	349	5	30.7%	52.1%
Shimane	316	2	30.7%	51.6%
Okayama	519	9	32.3%	53.1%
Hiroshima	775	37	41.0%	58.2%
Yamaguchi	406	5	34.6%	50.9%
Tokushima	200	3	28.5%	45.6%
Kagawa	301	8	33.9%	51.0%
Ehime	349	6	30.2%	48.4%
Kochi	272	2	25.0%	41.4%
Fukuoka	1,456	92	38.8%	56.0%
Saga	253	5	31.6%	50.2%
Nagasaki	691	40	33.1%	50.3%
Kumamoto	717	43	32.7%	52.0%
Oita	604	35	36.1%	50.6%
Miyazaki	353	13	32.6%	45.7%
Kagoshima	703	20	34.3%	47.7%
Okinawa	1,876	136	48.9%	58.2%

(Note) 1 Data based on the JTA's "Accommodation Survey."

2 Data does not reflect new openings or closures during the year. Annual revision values will vary slightly.

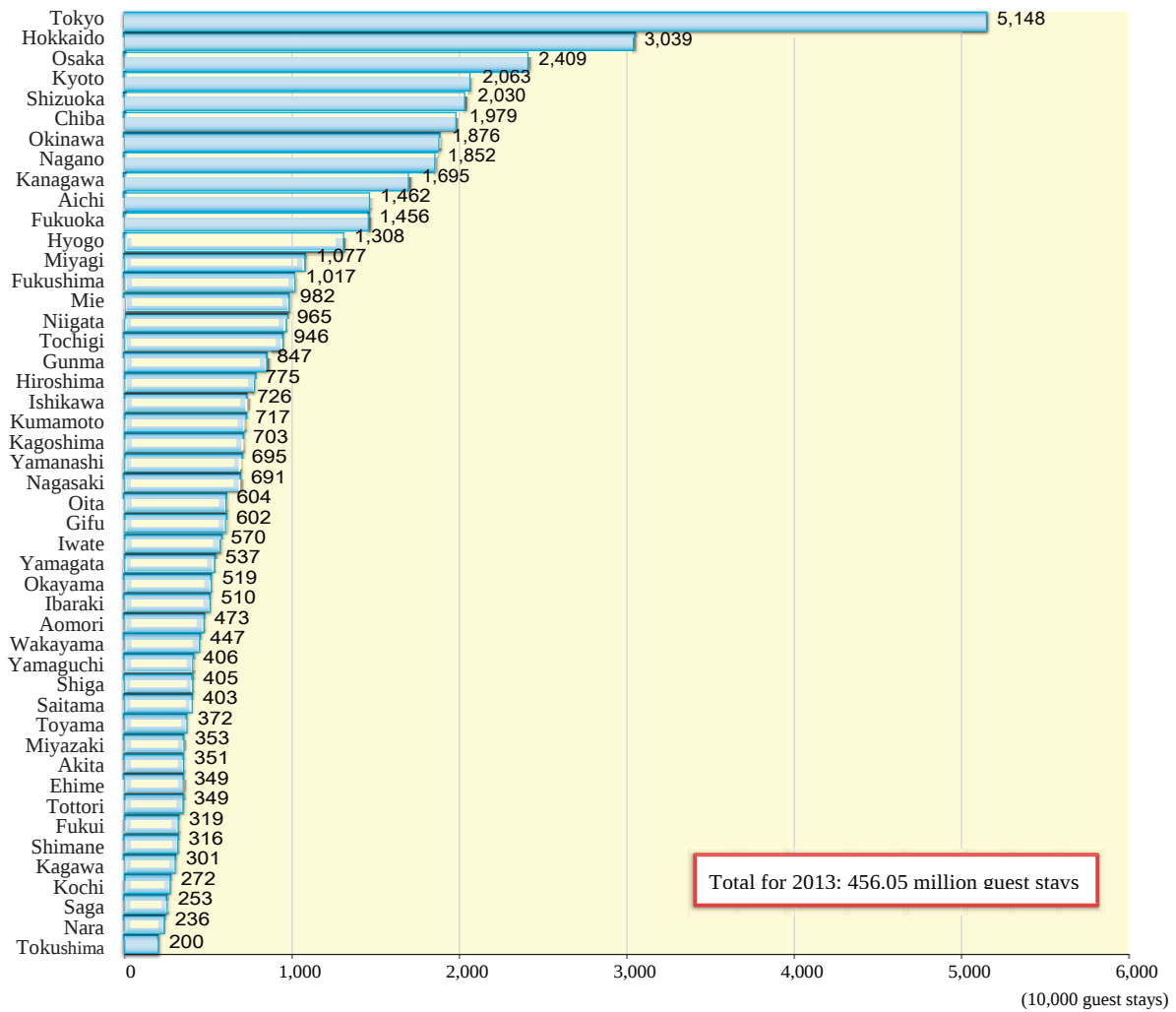
3 Includes foreign nationals of unknown countries / regions (origin).

4 The bed occupancy rate is the utilization rate of accommodation guests compared to guestroom capacity. For example, if one guest stayed in a guestroom with two guest capacity, the bed occupancy rate would be 50%.

5 The guestroom occupancy rate is utilization rate of guestrooms compared to total guestrooms in the accommodation.

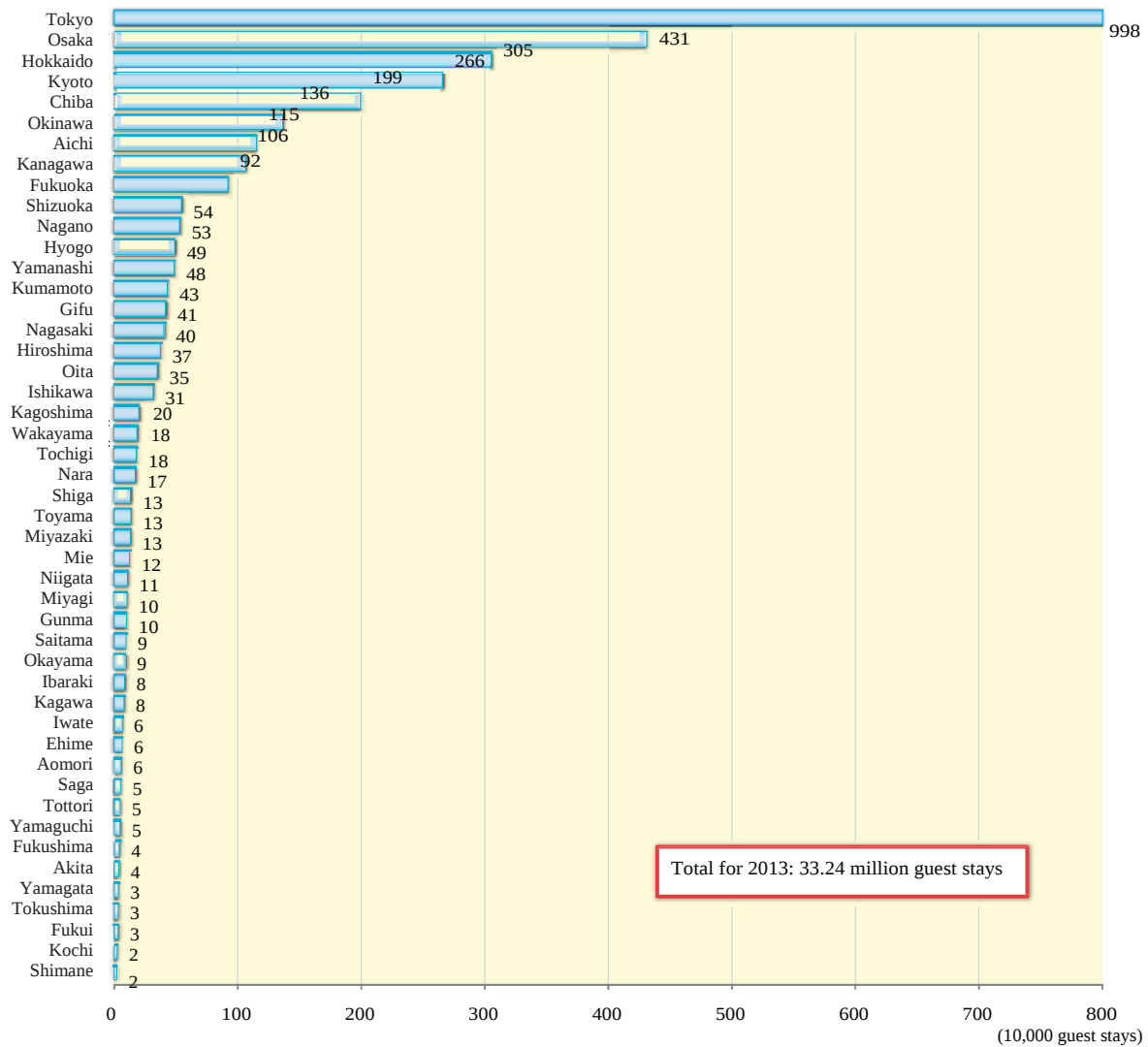
For example, if one of the accommodation's two guestrooms was occupied, the guestroom occupancy rate would be 50%.

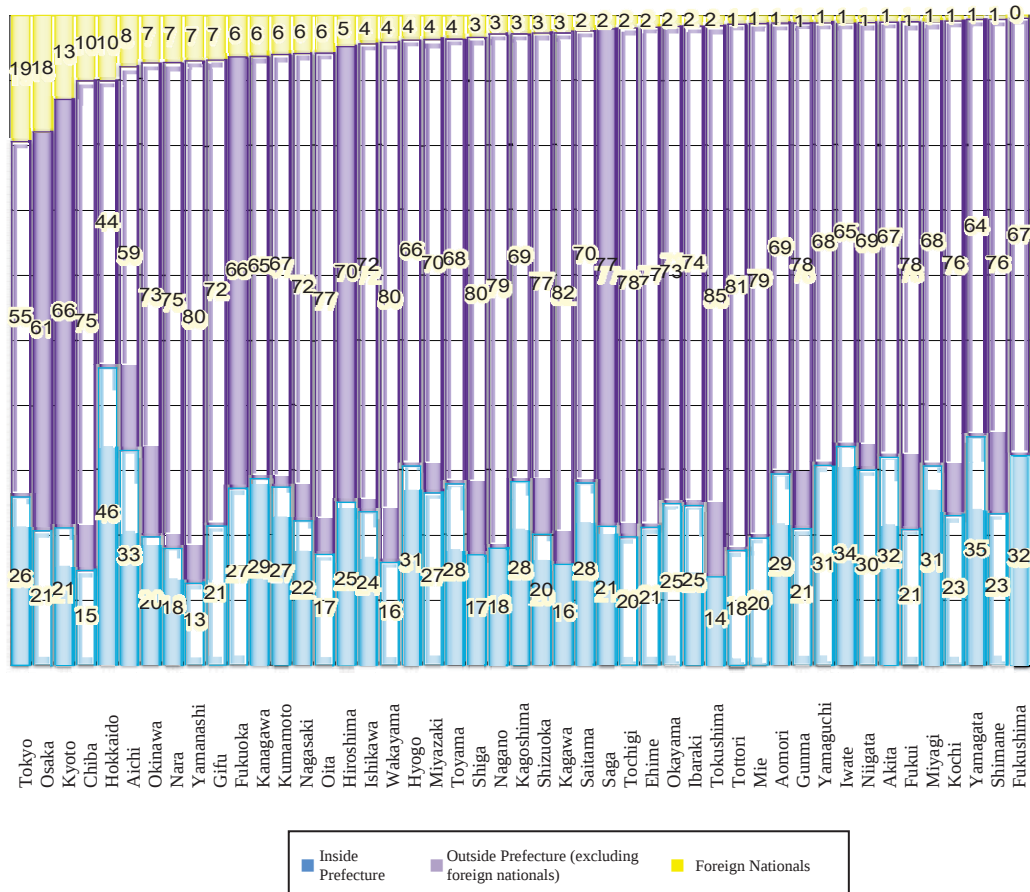
6 Accommodation guests include foreign nationals in this table.



(Note) 1 Data based on the JTA's "Accommodation Survey."

2 Data does not reflect new openings or closures during the year. Annual revision values will vary slightly



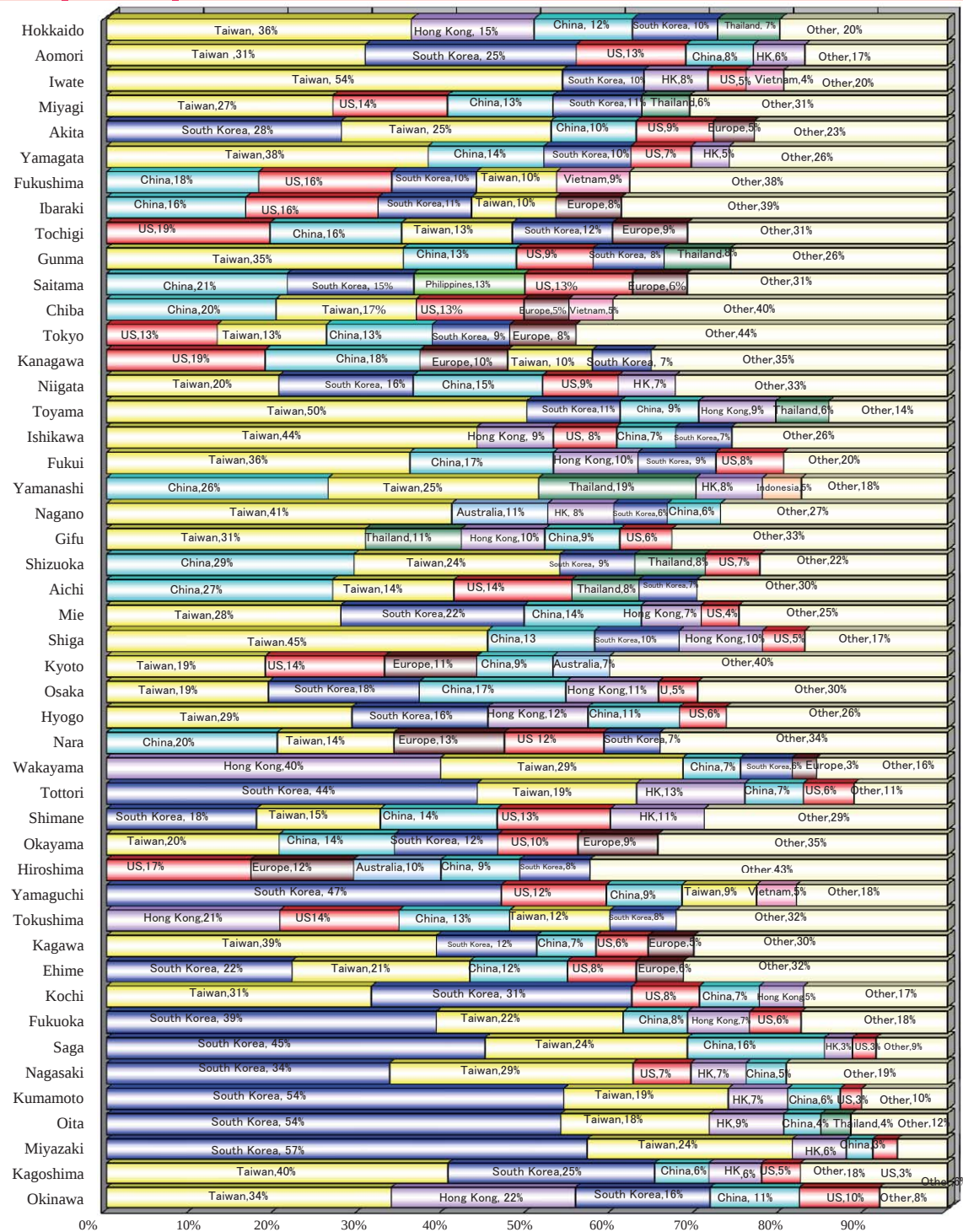


(Note) 1 Data based on the JTA's "Accommodation Survey."

2 The unknown portion of Japanese national accommodation guests by inside / outside the prefecture was calculated by prorating the ratio by inside/outside the prefecture and allocating the results to each.

3 "Foreign national" refers to someone that does not maintain an address in Japan.

4 Data does not reflect new openings or closures during the year. Annual revision values will vary slightly.

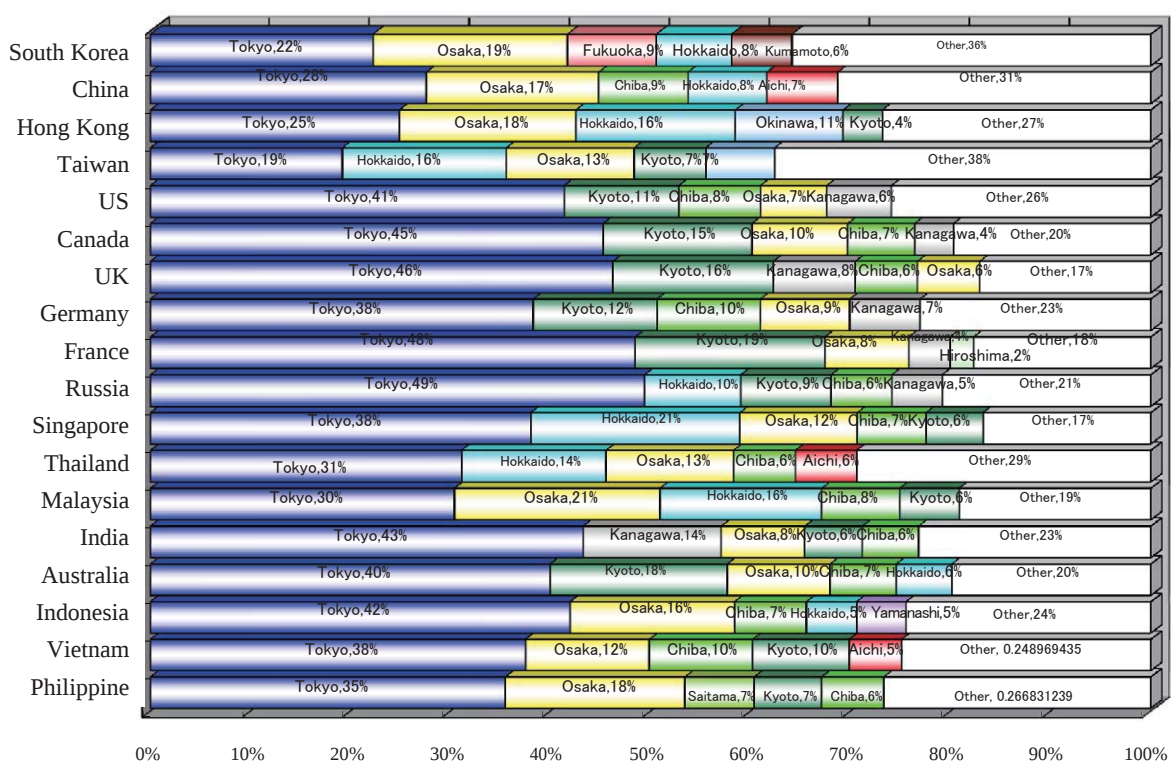


(Note) 1 Data based on the JTA's "Accommodation Survey."

2 Europe is Germany, United Kingdom and France (three countries).

3 Created based on survey of accommodation facilities with more than 10 employees

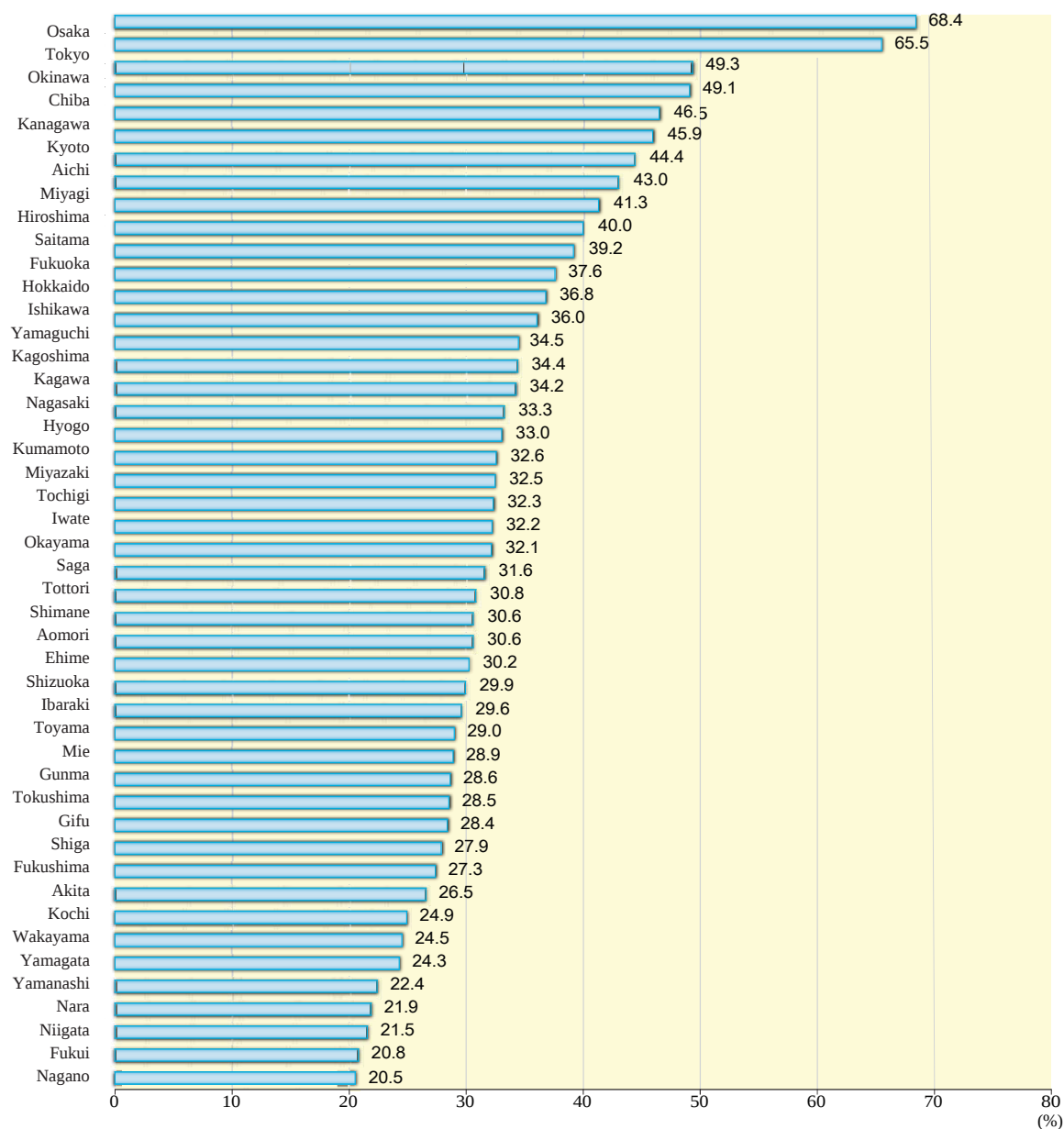
4 Data of 2013 are preliminary



(Note) 1 Data based on the JTA's "Accommodation Survey."

2 Data of 2013 are preliminary.

Data 16 Accommodation Facility Bed Occupancy Rate by Prefecture (2013)

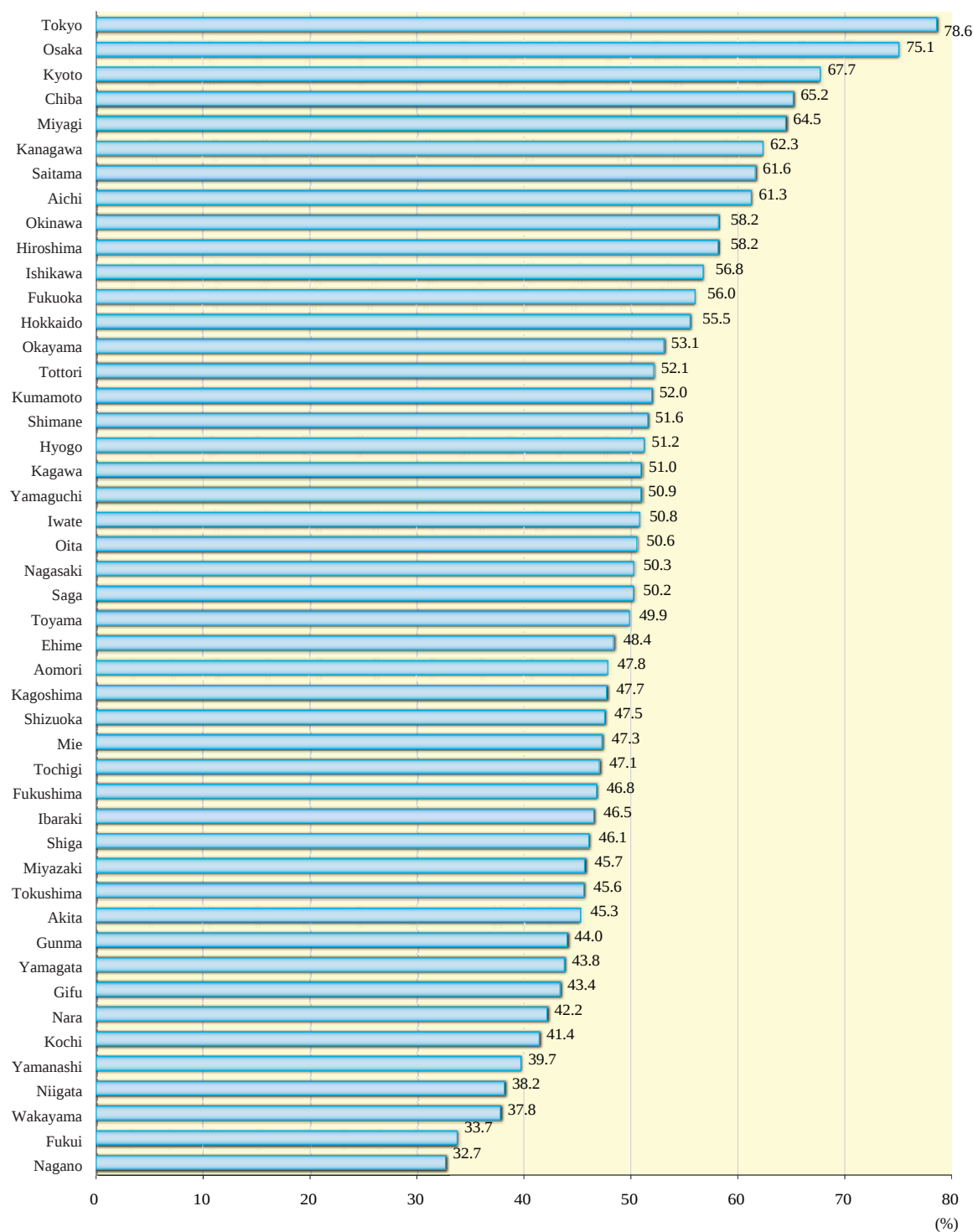


(Note) 1 Data based on the JTA's "Accommodation Survey."

2 The bed occupancy rate is the utilization rate of accommodation guests compared to guestroom capacity. For example, if one guest stayed in a guestroom with two guest capacity, the bed occupancy rate would be 50%.

3 Data does not reflect new openings or closures during the year. Annual revision values will vary slightly.

Data 17 Accommodation Guestroom Occupancy Rate by Prefecture (2013)



(Note) 1 Data based on the JTA's "Accommodation Survey."

2 The guestroom occupancy rate is utilization rate of guestrooms compared to total guestrooms in the accommodation.
For example, if one of the accommodation's two guestrooms was occupied, the bed occupancy rate would be 50%.

3 Data does not reflect new openings or closures during the year. Annual revision values will vary slightly.

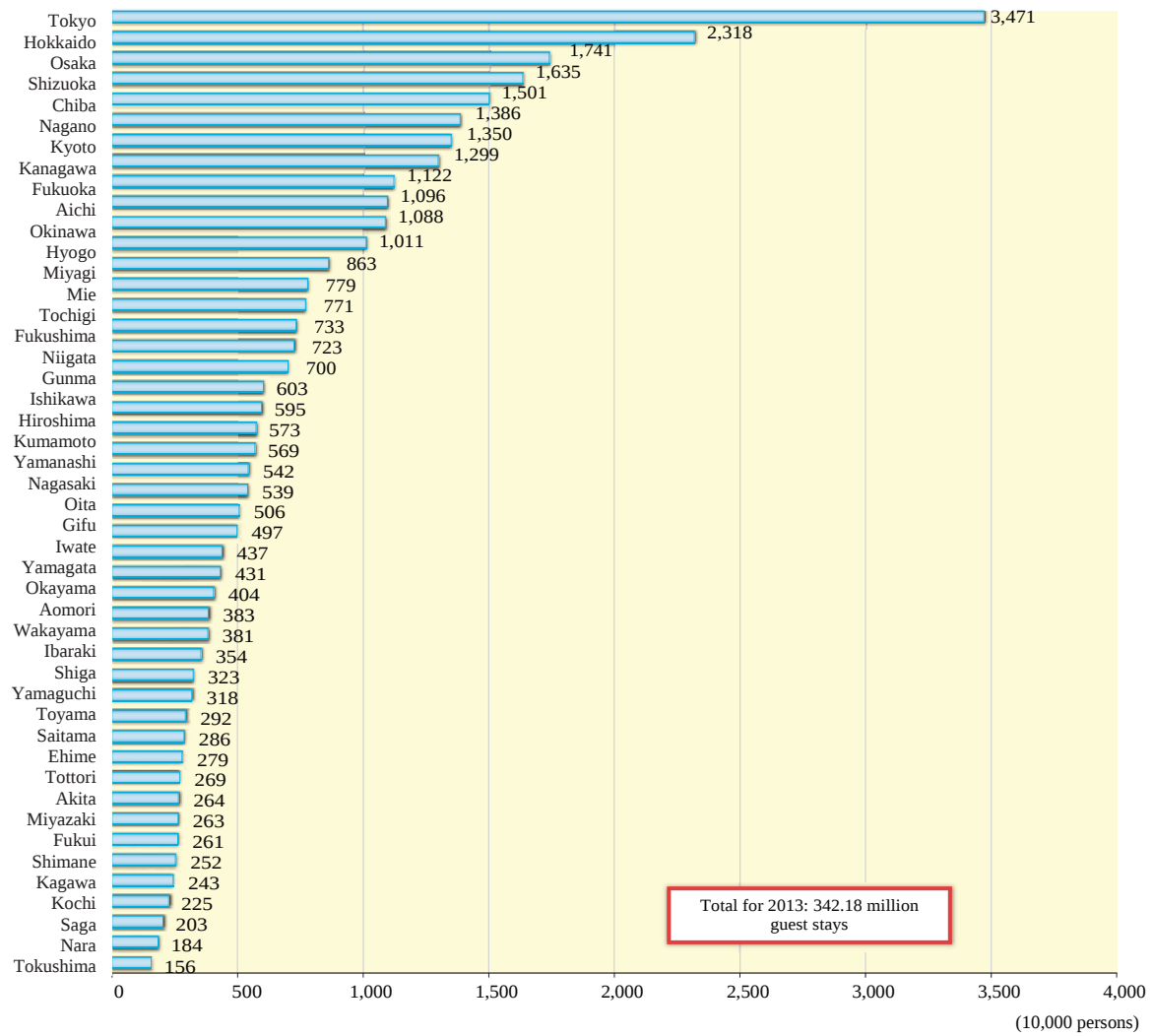
	Real Accommodation Guests (Persons)	Average Stays per Person	Foreign National Real Accommodation Guests (Persons)	Average Stays per Person
Total	342,178,250	1.33	21,049,170	1.58
Hokkaido	23,176,290	1.31	2,316,920	1.32
Aomori	3,829,280	1.23	39,930	1.43
Iwate	4,374,570	1.30	51,360	1.25
Miyagi	8,627,510	1.25	73,870	1.36
Akita	2,641,160	1.33	23,330	1.52
Yamagata	4,312,220	1.25	22,470	1.48
Fukushima	7,329,230	1.39	26,820	1.51
Ibaraki	3,537,180	1.44	45,140	1.82
Tochigi	7,706,560	1.23	131,050	1.36
Gunma	7,001,450	1.21	68,320	1.45
Saitama	2,864,020	1.41	41,980	2.26
Chiba	15,007,500	1.32	1,614,270	1.23
Tokyo	34,706,410	1.48	4,867,500	2.05
Kanagawa	12,985,260	1.31	698,560	1.52
Niigata	7,233,900	1.33	64,600	1.64
Toyama	2,923,340	1.27	112,110	1.19
Ishikawa	6,030,060	1.20	242,460	1.30
Fukui	2,613,840	1.22	22,460	1.34
Yamanashi	5,690,600	1.22	447,530	1.08
Nagano	13,857,800	1.34	341,320	1.55
Gifu	4,968,270	1.21	330,790	1.25
Shizuoka	16,347,730	1.24	437,750	1.24
Aichi	10,961,900	1.33	749,680	1.53
Mie	7,785,020	1.26	80,880	1.50
Shiga	3,231,350	1.25	107,400	1.25
Kyoto	13,499,570	1.53	1,434,750	1.85
Osaka	17,413,100	1.38	2,788,200	1.55
Hyogo	10,110,900	1.29	347,030	1.41
Nara	1,835,160	1.29	106,440	1.60
Wakayama	3,807,320	1.17	153,600	1.19
Tottori	2,690,770	1.30	35,960	1.30
Shimane	2,524,790	1.25	13,500	1.36
Okayama	4,039,080	1.28	66,300	1.31
Hiroshima	5,952,820	1.30	242,870	1.53
Yamaguchi	3,176,110	1.28	34,230	1.35
Tokushima	1,562,030	1.28	23,570	1.31
Kagawa	2,434,800	1.23	62,220	1.26
Ehime	2,785,830	1.25	39,060	1.59
Kochi	2,245,210	1.21	15,100	1.51
Fukuoka	11,219,230	1.30	665,470	1.38
Saga	2,026,050	1.25	43,880	1.18
Nagasaki	5,424,690	1.27	316,140	1.27
Kumamoto	5,732,620	1.25	368,210	1.16
Oita	5,060,030	1.19	301,360	1.15
Miyazaki	2,627,910	1.34	91,330	1.42
Kagoshima	5,392,180	1.30	156,870	1.26
Okinawa	10,875,700	1.73	784,620	1.74

(Note) 1 Data based on the JTA's "Accommodation Survey."

2 The average accommodation stays in this charge indicates the average number of stays made per person at the same accommodation facility.

3 Data does not reflect new openings or closures during the year. Annual revision values will vary slightly.

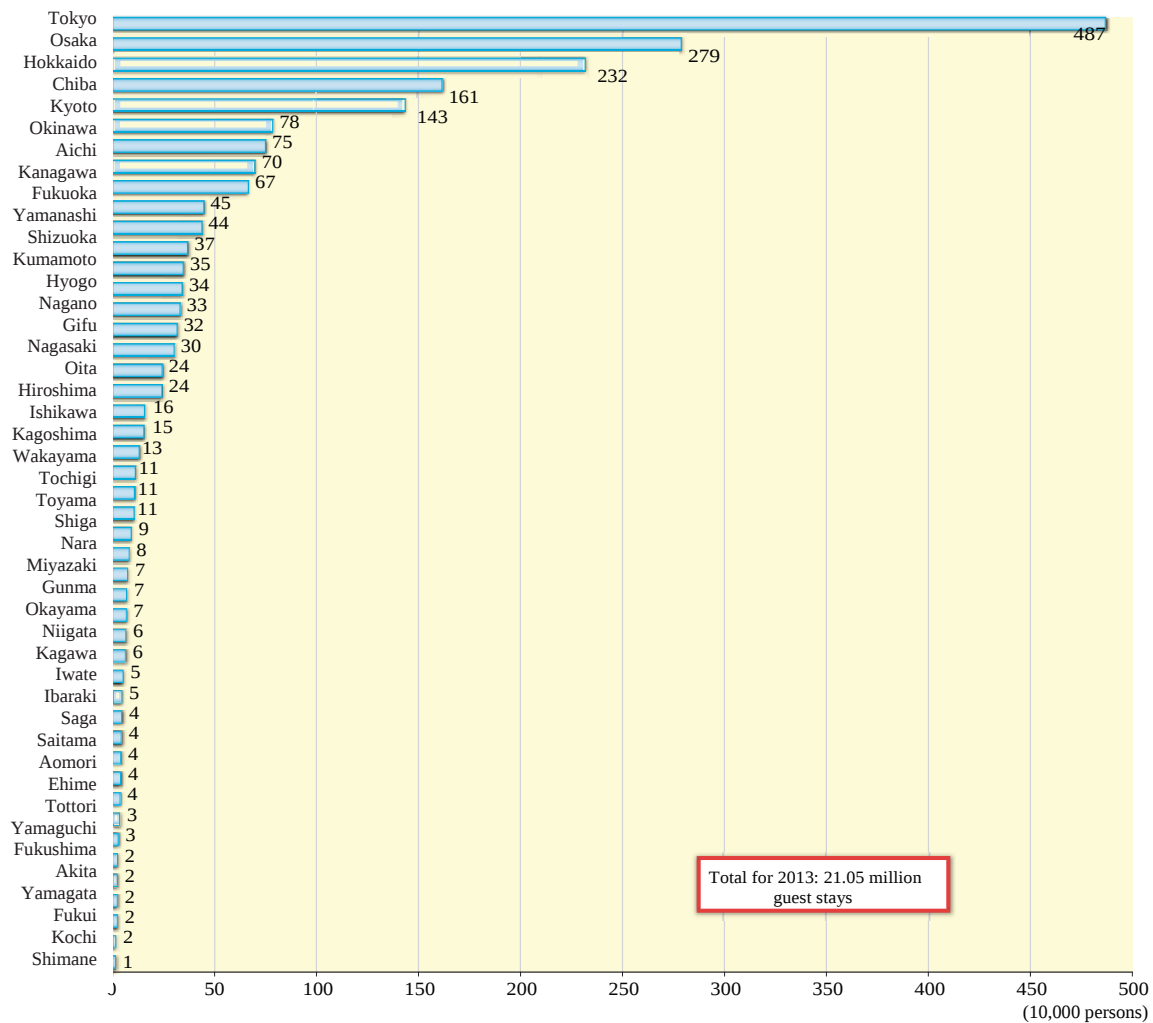
4 Real accommodation guests include real foreign national accommodation guests in this chart.



(Note) 1 Data based on the JTA's "Accommodation Survey."

2 Data does not reflect new openings or closures during the year. Annual revision values will vary slightly.

Data 20 Real Foreign National Accommodation Guests by Prefecture (2013)



(Note) 1 Data based on the JTA's "Accommodation Survey."

2 Data does not reflect new openings or closures during the year. Annual revision values will vary slightly.

Prefecture	Inbound Guests (10,000 stays)	Tourism Spending (100 million yen)
Hokkaido	5,271	7,548
Aomori	1,389	1,938
Iwate	1,286	2,062
Miyagi	3,051	3,284
Akita	1,041	1,429
Yamagata	1,656	1,992
Fukushima	2,173	3,536
Ibaraki	3,258	2,335
Tochigi	4,223	4,732
Gunma	2,910	2,487
Saitama	10,005	4,272
Chiba *1	0	0
Tokyo	47,482	49,913
Kanagawa	7,115	7,064
Niigata	2,952	3,276
Toyama *1	0	0
Ishikawa	1,221	1,886
Fukui *1	0	0
Yamanashi	2,735	3,215
Nagano	3,787	5,624
Gifu	3,619	2,737
Shizuoka	6,257	9,110
Aichi	9,362	5,659
Mie	2,749	2,938
Shiga *1	0	0
Kyoto *1	0	0
Osaka *2	0	0
Hyogo	7,026	6,137
Nara	1,936	1,278
Wakayama	1,192	1,514
Tottori	767	940
Shimane	1,119	999
Okayama	1,322	1,495
Hiroshima	2,303	2,280
Yamaguchi	1,729	1,668
Tokushima	941	751
Kagawa	1,546	1,454
Ehime	1,356	1,259
Kochi	632	1,111
Fukuoka *1	0	0
Saga	1,302	1,017
Nagasaki	1,438	2,654
Kumamoto	2,473	2,766
Oita	1,754	2,078
Miyazaki	1,390	1,567
Kagoshima	1,647	2,575
Okinawa	1,047	4,843

(Note) 1 Data still being compiled for Chiba, Toyama, Fukui, Shiga, Kyoto and Fukuoka.

2 Osaka Prefecture has yet to introduce the common standard for its statistics.

3 Compiled by the JTA based on the "Inbound Tourism Statistics based on the Common Standard used for Inbound Tourism Statistics" for each prefecture.

4 Data represents the combined total for Japanese nationals (business or pleasure purposes) and foreign nationals.

	Destination	Standards	2008		2009		2010		2011		2012		2013	
			Persons	Change YoY(%)	Persons	Change YoY(%)	Persons	Change YoY(%)	Persons	Change YoY(%)	Persons	Change YoY(%)	Persons	Change YoY(%)
Asia	China	N/F/V	3,446,117	-13.4	3,317,459	-3.7	3,731,20	12.5	3,658,200	-2.0	3,518,153	-3.8	2,877,500	-18
	South Korea	N/F/V	2,378,102	6.4	3,053,311	28.4	3,023,00	-1.0	3,289,051	8.8	3,518,792	7.0	2,747,750	-22
	Hong Kong	R/F/V	1,324,797	0.0	1,204,490	-9.1	1,316,61	9.3	1,283,687	-2.5	1,254,602	-2.3	1,057,033	-16
	Taiwan	R/F/V	1,086,691	-6.8	1,000,661	-7.9	1,080,15	7.9	1,294,758	19.9	1,432,315	10.6	1,421,550	-1
	Thailand	N/F/T	1,153,868	-9.7	1,004,453	-12.9	993,674	-1.1	1,127,893	13.5	1,373,716	21.8	1,537,979	12
	Singapore	R/F/V	571,040	-3.9	489,987	-14.2	528,817	7.9	656,417	24.1	757,116	15.3		
	Vietnam	R/F/V	393,091	-4.5	359,231	-8.6	442,089	23.1	481,519	8.9	576,386	19.7	604,050	5
	Malaysia	R/F/T	433,462	17.9	395,746	-8.7	415,881	5.1	386,974	-7.0	470,008	21.5	513,076	9
	Macau	R/F/V	366,920	22.6	379,241	3.4	413,507	9.0	396,023	-4.2	395,989	0.0	290,622	-27
	Indonesia	R/F/T	546,713	7.4	475,766	-13.0	418,971	-11.9	412,623	-1.5	450,687	9.2		
	Philippines	R/F/T	359,306	-9.0	324,980	-9.6	358,744	10.4	375,496	4.7	412,474	9.8		
	India	N/F/T	145,352	-0.1	124,756	-14.2	168,019	34.7	193,525	15.2	220,015	13.7		
	Cambodia	R/F/V	163,806	1.1	146,286	-10.7	151,795	3.8	161,804	6.6	179,327	10.8		
	Maldives	N/F/T	38,193	-7.1	36,641	-4.1	38,791	5.9	35,782	-7.8	36,438	1.8		
	Laos	N/F/V	31,569	6.0	28,081	-11.0	34,076	21.3	37,833	11.0	42,026	11.1		
	Nepal	N/F/T	23,383	-13.6	22,445	-4.0	23,332	4.0	26,283	12.6	28,642	9.0		
	Myanmar	N/F/T	10,881	-30.4	13,809	26.9	16,186	17.2	21,321	31.7	47,690	123.7		
	Mongolia	N/F/V	15,036	-13.1	11,496	-23.5	14,279	24.2	15,336	7.4	17,642	15.0		
	Sri Lanka	R/F/T	10,578	-25.9	10,931	3.3	14,998	37.2	20,951	39.7	26,085	26.7		
	Pakistan	N/F/T	8,294	-24.8	6,705	-19.2	7,090	5.7	9,918	40.1	8,242	-16.9		
	Bangladesh	N/F/T	N.A.	—	N.A.	—	N.A.	—						
Oceania	Guam	R/F/T	850,034	-8.7	825,129	-2.9	893,667	8.3	824,005	-7.8	929,229	12.8	893,118	-4
	Australia	R/F/V	457,232	-20.2	355,456	-22.3	398,188	12.0	332,700	-16.4	353,993	6.4	328,900	-7
	North Mariana	N/F/V	213,299	6.6	191,111	-10.4	185,032	-3.2	142,946	-22.7	153,259	7.2		
	New Zealand	R/F/V	102,482	-15.8	78,426	-23.5	87,735	11.9	68,963	-21.4	72,080	4.5	74,560	3
	Palau	R/F/V	30,018	2.8	26,688	-11.1	29,318	9.9	37,800	28.9	39,353	4.1		
	New Caledonia	R/F/T	20,225	-24.4	18,926	-6.4	18,534	-2.1	18,455	-0.4	17,430	-5.6		
	Tahiti	R/F/T	18,769	-19.2	16,353	-12.9	13,761	-15.9	12,990	-5.6	12,989	0.0		
	Fiji	R/F/T	21,918	-3.9	14,975	-31.7	12,011	-19.8	9,616	19.9	7,069	-26.5		
Central Asia, Middle East and North Africa	Turkey	N/F/V	149,731	-11.3	147,641	-1.4	195,404	32.4	188,312	-3.6	203,592	8.1	174,150	-15
	Morocco	N/F/T	15,607	-7.7	19,149	22.7	24,366	27.2	22,861	-6.2	30,306	32.6		
	Jordan	N/F/V	13,810	7.7	13,052	-5.5	19,052	46.0	12,829	-32.7	15,321	19.4		
	Bahrain	N/F/V	N.A.	—	N.A.	—	N.A.	—	17,129	-				
	Israel	R/F/T	14,506	35.9	9,768	-32.7	13,957	42.9	14,112	1.1	16,011	19.1		
	Armenia	R/F/T	11,110	9.5	11,900	7.1	11,730	-1.4	12,973	10.6	12,968	0.0		
	Oman	N/HA/T	10,275	33.1	12,953	26.1	8,982	-30.7	6,989	16.9				
	Tunisia	N/F/T	11,206	-1.8	11,073	-1.2	13,385	20.9	3,120	-76.7	8,002	156.5		
	Saudi Arabia	N/F/T	14,590	17.3	6,539	-55.2	9,210	40.8	16,410	78.2	11,803	-28.1		
	Syria	N/F/V	8,325	19.6	8,764	5.3	11,600	32.4	3,174	-76.2				
	Kazakhstan	R/F/V	5,013	-4.0	4,292	-14.4	4,528	5.5	4,720	6.6	6,049	28.2		
	Kuwait	N/F/V	6,215	-5.1	4,606	-25.9	4,959	7.7	4,798	-3.2	5,291	10.3		
Africa	Egypt	N/F/V	108,225	-16.5	92,409	-14.6	126,393	36.8	27,635	-78.1	39,008	41.2		
	South Africa	R/F/T	27,621	-13.3	20,513	-25.7	27,577	34.4	26,284	-4.7	34,415	30.9		
	Nigeria	N/F/V	26,087	11.1	27,130	4.0	27,340	0.8	26,300	-3.8	41,988	59.7		
	Zimbabwe	R/F/V	14,803	14.3	18,389	24.2	18,593	1.1	32,784	76.3	18,032	-45.0		
	Kenya	R/F/V	7,411	-41.8	10,150	37.0	10,866	7.1						
	Zambia	R/F/T	4,241	-12.3	5,373	26.7	8,341	55.2	11,346	36.0	3,535	-68.8		
	Madagascar	N/F/T	7,500	1.4	1,627	-78.3	1,960	20.5	2,925	49.2				
	France	R/F/T	674,000	-3.4	697,000	3.4	595,977	-14.5	621,541	4.3	732,283	19.6		
Europe	Germany	R/AA/T	597,655	-9.7	537,984	-10.0	605,231	12.5	642,542	6.2	734,475	14.3		
	Spain	R/F/T	237,493	-31.4	229,856	-3.2	332,930	44.8	334,314	0.4	362,081	5.6	374,175	3
	Italy	N/F/T	283,819	-11.5	320,591	13.0	340,210	6.1	314,239	-7.6	353,547	12.5		
	Switzerland	R/HA/T	277,657	-14.4	275,505	-0.8	297,562	8.0	275,923	-7.3	295,991	7.3		
	United Kingdom	R/F/V	238,910	-22.3	235,471	-1.4	223,000	-5.3	237,000	6.3	242,700	2.4		
	Austria	R/AA/T	200,791	-12.5	191,321	-4.7	206,217	7.8	220,691	7.0	261,261	14.3		
	Croatia	R/AA/T	143,704	66.3	163,400	13.7	147,119	-10.0	131,630	-10.5	155,088	17.8		
	Czech Republic	N/AA/T	123,275	-9.7	114,777	-6.9	133,052	15.9	121,663	-8.6	136,557	12.2		
	The Netherlands	R/HA/T	114,400	-11.2	99,300	-13.2	119,000	19.8	110,500	-7.1	136,300	23.3		
	Belgium	R/AA/T	94,948	-8.2	74,509	21.5	75,976	2.0	86,778	14.2	111,690	22.2		

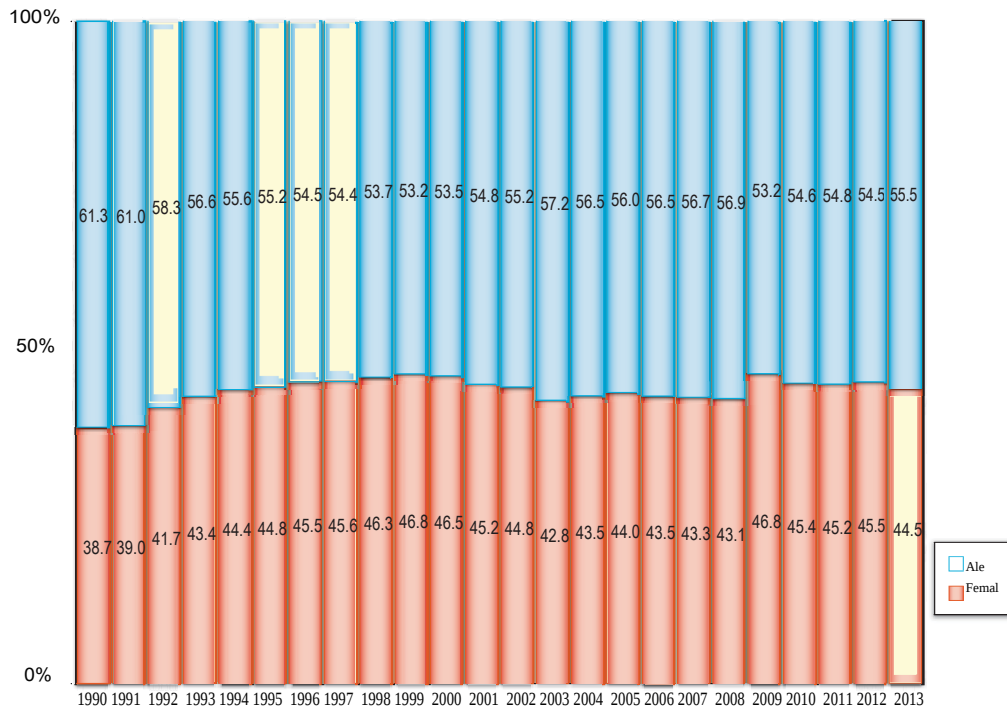
	Destination	Standards	2008		2009		2010		2011		2012		2013	
			Persons	Change YoY(%)	Persons	Change YoY(%)	Persons	Change YoY(%)	Persons	Change YoY(%)	Persons	Change YoY(%)	Persons	Change YoY(%)
Europe	Russia	N/F/V	86,237	3.1	74,159	-14.0	78,188	5.4	76,204	-2.5	86,806	13.9		
	Hungary	N/AA/T	75,261	-20.7	71,124	-5.5	76,862	8.1	69,724	-9.3	77,093	10.6		
	Finland	R/AA/T	80,180	-2.8	65,949	-17.7	68,747	4.2	75,680	10.1	91,783	21.3		
	Portugal	R/AA/T	63,486	-4.5	57,641	-9.2	61,690	7.0	60,700	-1.6	64,578	10.4		
	Sweden	R/AA/T	50,020	-3.4	45,549	-8.9	48,377	6.2	46,718	-3.4	45,723	-2.1		
	Slovenia	N/AA/T	39,733	62.1	48,182	21.3	40,428	-16.1	35,292	-12.7	41,398	17.2		
	Poland	N/F/T	42,000	-11.6	35,000	-16.7	60,000	71.4	45,000	-25.0	40,000	-11.1		
	Denmark	R/AA/T	33,233	-3.9	30,726	-7.5	33,837	10.1	20,687	-38.9	24,267	17.3		
	Norway	N/F/T	29,000	-9.4	25,000	-13.8	28,000	12.0	27,000	-3.6				
	Slovenia	N/AA/T	13,743	1.8	11,351	-17.4	11,523	1.5	8,865	-23.1	10,117	14.1		
	Ireland	R/F/T	14,000	-12.5	11,000	-21.4								
	Romania	R/F/V	13,095	-15.6	10,345	-21.0	12,333	19.2	13,544	9.8	14,252	5.2		
	Bulgaria	R/F/V	9,830	-19.1	8,458	-14.0	9,969	17.9	10,236	2.7	11,148	8.9		
	Iceland	N/AA/T	11,205	3.8	12,454	11.1	9,842	-21.0	12,683	28.9	21,571	70.1		
	Lithuania	R/AA/T	9,349	2.7	7,599	-18.7	7,654	0.7	8,528	11.4	9,465	11.0		
	Estonia	R/AA/T	6,862	0.9	7,253	5.7	7,235	-0.2	8,732	20.7	8,778	0.5		
	Greece	N/F/T	10,926	-62.0	6,765	-38.1	10,021	48.1	10,125	1.0	8,841	-12.7		
	Latvia	R/AA/T	6,043	-0.4	6,690	10.7	5,428	-18.9	5,843	7.6	7,322	25.3		
	Ukraine	R/F/T	6,437	-6.8	5,439	-15.5	6,206	14.1	7,585	22.2	8,528	12.4		
	Monaco	N/HA/T	6,017	-6.6	5,124	-14.8	4,526	-11.7	4,997	10.4	5,576	11.6		
	San Marino	N/F/V	3,170	-4.1	N.A.	—	N.A.	—	3,590	-16.1	2,933	-18.3		
North America	United States	R/F/T	3,249,578	-8.0	2,918,268	-10.2	3,386,076	16.0	3,249,569	-4.0	3,698,073	13.8		
	(Hawaii)	R/F/T	1,175,199	-9.4	1,168,080	-0.6	1,239,307	6.1	1,241,805	0.2	1,465,654	18.0	1,523,302	4
Latin America	Canada	R/F/V	287,198	-16.4	205,639	-28.4	243,040	18.2	218,813	-10.0	240,000	9.7		
	Mexico	N/F/T	69,716	-3.0	52,229	-25.1	66,164	26.7	72,338	9.3	85,687	18.5		
	Brazil	R/F/T	81,270	28.2	66,655	-18.0	59,742	-10.4	63,247	5.9	73,102	15.6		
	Peru	R/F/T	46,059	15.5	40,018	-13.1	30,604	-23.5	43,794	43.1	56,526	29.1		
	Argentina	N/F/T	N.A.	—	N.A.	—								
	Chile	N/F/T	15,553	6.0	13,129	-4.4	14,261	8.6	12,693	-11.0	15,059	18.6		
	Bolivia	N/HA/T	8,631	25.9	8,035	-6.9	6,683	-16.8	7,813	16.9	11,873	52.0		
	Guatemala	N/F/V	6,521	-4.0	5,110	-21.6	7,081	38.6	6,956	-1.8	8,853	27.3		
	Cuba	R/F/V	5,550	-16.5	5,460	-1.6	6,372	16.7	5,420	-14.9	7,348	35.6		
	Colombia	N/F/V	5,302	8.9	4,987	-5.9	4,312	-13.5	4,769	10.6	5,578	17.0		
	Ecuador	N/F/V	5,533	16.2	4,868	-12.0	5,106	4.9	5,113	0.1	5,342	4.5		
	Costa Rica	N/F/T	5,368	-1.3	4,746	-11.6	5,026	5.9	4,758	-5.3	5,117	7.5		
	Panama	R/F/V	6,475	13.8	3,133	-51.6	3,988	27.3	4,525	13.5	5,043	11.4		

Prepared by: JNTO (Japan National Tourist Organization)/Source: UNWTO (World Tourism Organization) Pacific Asia

◆Remarks: R: Reported by residence / N: Reported by nationality / F: Frontier arrivals / AA: Arrivals in registered tourist accommodations / HA: Arrivals in hotels / AN: Nights in registered tourist accommodations / HN: Nights spent in hotels / V: Both same-day trip and overnight visitors / T: Overnight visitors only

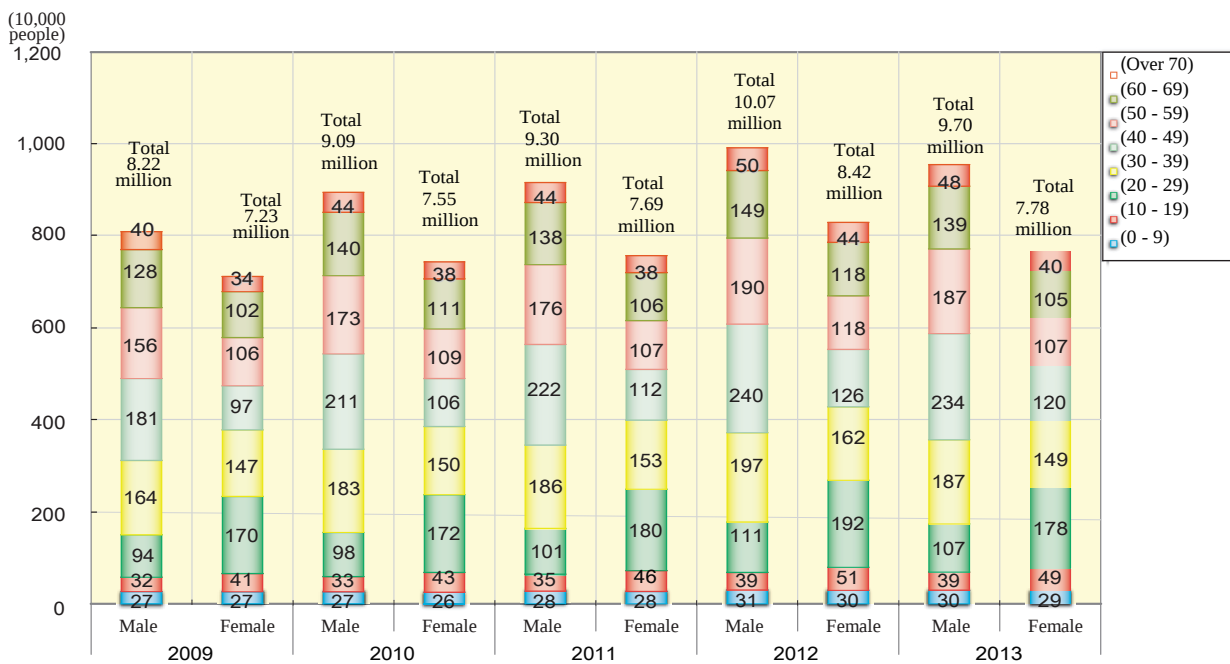
- (Note) 1 This table contains countries/regions to which more than 5,000 Japanese nationals traveled.
2 Data for frontier arrivals and hotel arrivals is combined in this table, and tabulation standards differ, making it impossible to compare the same indicator. Particular caution should be heeded when comparing with data for Europe.
3 Data for the United States includes arrivals to the 50 states and the District of Columbia as well as arrivals for the country's protectorates, including the Northern Mariana Islands, Guam, U.S Samoa, Puerto Rico and the U.S. Virgin Islands.
4 Data of Hawaii is included in the data of the United States.
5 Saipan is located in the Northern Mariana Islands.
6 Data of Peru are all preliminary.
7 The number of Japanese nationals visiting North Korea, Uzbekistan, Iran, United Arab Emirates, Qatar, Luxembourg, Malta, Belize, Haiti, Sudan, Mozambique, Namibia, Côte d'Ivoire and Senegal is unknown.
8 The values for each country may be changed retroactively because of changes made from estimate to finalized data, changes to statistical standards, or data inconsistencies.
9 The values in this table represent provisional information as of March, 2014.

Data 23 Share of Japanese International Travelers by Gender



(Note) Compiled by the JTA based on Ministry of Justice data.

Data 24 Japanese International Travelers by Age and Gender



(Note) Compiled by the JTA based on Ministry of Justice data.

Data 25

Passenger Traffic of Departing Japanese Nationals

(1,000 people)

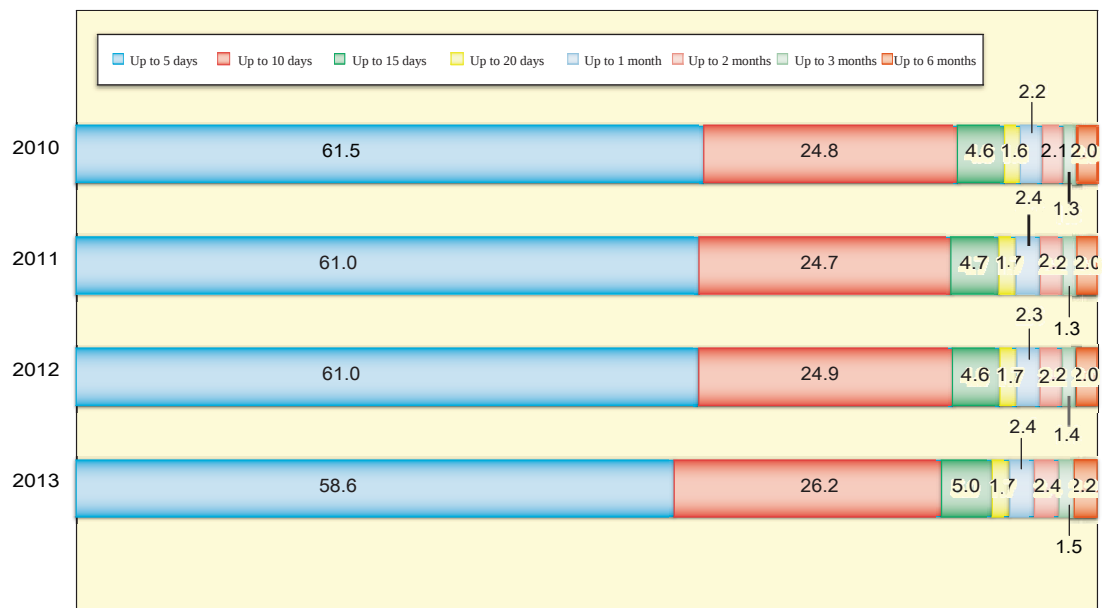
Year	Airport	By air								By sea	Total	
		Subtotal	New Chitose	Narita	Haneda	Chubu	Kansai	Fukuoka	Naha			Other regional airports
2007		17,107	102	9,548	466	1,974	3,688	679	49	602	188	17,295
		(98.9)	(0.6)	(55.2)	(2.7)	(11.4)	(21.3)	(3.9)	(0.3)	(3.5)	(1.1)	(100.0)
2008		15,791	90	8,751	640	1,782	3,337	633	42	516	196	15,987
		(98.8)	(0.6)	(54.7)	(4.0)	(11.1)	(20.9)	(4.0)	(0.3)	(3.2)	(1.2)	(100.0)
2009		15,240	103	8,281	780	1,576	3,184	676	46	595	205	15,446
		(98.7)	(0.7)	(53.6)	(5.1)	(10.2)	(20.6)	(4.4)	(0.3)	(3.9)	(1.3)	(100.0)
2010		16,450	114	8,713	1,194	1,640	3,349	732	45	663	187	16,637
		(98.9)	(0.7)	(52.4)	(7.2)	(9.9)	(20.1)	(4.4)	(0.3)	(4.0)	(1.1)	(100.0)
2011		16,798	132	7,590	2,606	1,617	3,389	816	56	592	197	16,994
		(98.8)	(0.8)	(44.7)	(15.3)	(9.5)	(19.9)	(4.8)	(0.3)	(3.5)	(1.2)	(100.0)
2012		18,280	155	8,320	2,838	1,669	3,623	918	61	697	210	18,491
		(98.9)	(0.8)	(45.0)	(15.3)	(9.0)	(19.6)	(5.0)	(0.3)	(3.8)	(1.1)	(100.0)
2013		17,308	137	8,052	2,664	1,530	3,439	861	58	568	165	17,473
		(99.1)	(0.8)	(46.1)	(15.2)	(8.8)	(19.7)	(4.9)	(0.3)	(3.3)	(0.9)	(100.0)

(Note) 1 Compiled by the JTA based on Ministry of Justice data.

2 Parenthesis indicates share (percentage).

Data 26

Comparison of Japanese International Travelers' Duration of Stay



(Note) 1 Compiled by the JTA based on Ministry of Justice documents.

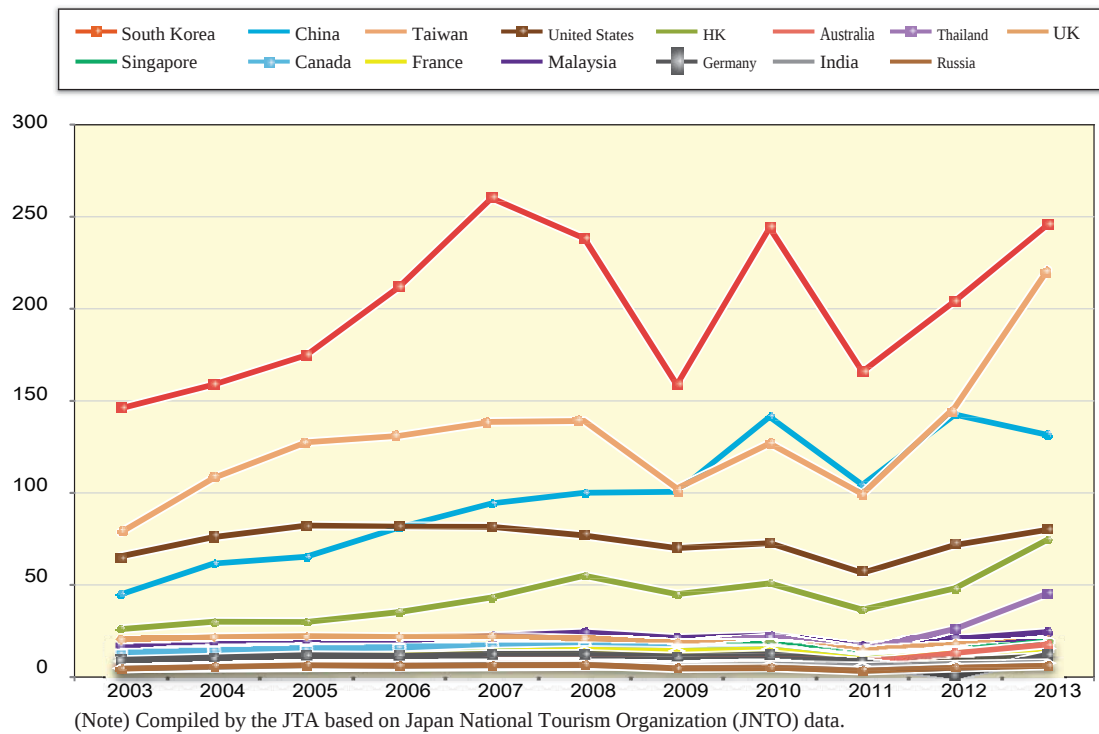
2 Calculated based on the number of returning Japanese nationals whose duration of stay was less than six months.

Region	Country	2007			2008			2009			2010			2011			2012			2013		
		Number of persons (Persons)	Share (%)	Change YoY (%)	Number of persons (Persons)	Share (%)	Change YoY (%)	Number of persons (Persons)	Share (%)	Change YoY (%)	Number of persons (Persons)	Share (%)	Change YoY (%)	Number of persons (Persons)	Share (%)	Change YoY (%)	Number of persons (Persons)	Share (%)	Change YoY (%)	Number of persons (Persons)	Share (%)	Change YoY (%)
North America	United States	815,882	9.8	99.9	768,345	9.2	94.2	699,919	10.3	91.1	727,234	8.4	103.9	565,887	9.1	77.8	716,709	8.6	126.7	799,280	7.7	111.5
	Canada	165,993	2.0	105.4	168,307	2.0	101.4	152,756	2.2	90.8	153,303	1.8	100.4	101,299	1.6	66.1	135,355	1.6	133.6	152,766	1.5	112.9
	Mexico	28,203	0.3	138.4	24,194	0.3	85.8	16,454	0.2	68.0	19,248	0.2	117.0	13,080	0.2	68.0	18,502	0.2	141.5	23,338	0.2	126.1
	Other	6,940	0.1	99.7	6,279	0.1	90.5	5,488	0.1	87.4	6,111	0.1	111.4	4,780	0.1	78.2	5,835	0.1	122.1	6,597	0.1	113.1
	Subtotal	1,017,018	12.2	101.5	967,125	11.6	95.1	874,617	12.9	90.4	905,896	10.5	103.6	685,046	11.0	75.6	876,401	10.5	127.9	981,981	9.5	112.0
South America	Brazil	18,853	0.2	104.0	20,981	0.3	111.3	16,899	0.2	80.5	21,393	0.2	126.6	18,470	0.3	86.3	32,111	0.4	173.9	27,106	0.3	84.4
	Other	18,148	0.2	115.9	17,586	0.2	96.9	16,582	0.2	94.3	18,088	0.2	109.1	13,292	0.2	73.5	19,040	0.2	143.2	22,824	0.2	119.9
	Subtotal	37,001	0.4	109.5	38,567	0.5	104.2	33,481	0.5	86.8	39,481	0.5	117.9	31,762	0.5	80.4	51,151	0.6	161.0	49,930	0.5	97.6
Europe	United Kingdom	221,945	2.7	102.5	206,564	2.5	93.1	181,460	2.7	87.8	184,045	2.1	101.4	140,099	2.3	76.1	173,994	2.1	124.2	191,798	1.9	110.2
	France	137,787	1.7	117.0	147,580	1.8	107.1	141,251	2.1	95.7	151,011	1.8	106.9	95,438	1.5	63.2	130,412	1.6	136.6	154,892	1.5	118.8
	Germany	125,193	1.5	108.5	126,207	1.5	100.8	110,692	1.6	87.7	124,360	1.4	112.3	80,772	1.3	65.0	108,898	1.3	134.8	121,776	1.2	111.8
	Italy	54,022	0.6	116.4	56,243	0.7	104.1	59,607	0.9	106.0	62,394	0.7	104.7	34,035	0.5	54.5	51,801	0.6	152.2	67,228	0.6	129.8
	Russia	64,244	0.8	105.9	66,270	0.8	103.2	46,952	0.7	70.8	51,457	0.6	109.6	33,793	0.5	65.7	50,176	0.6	148.5	60,502	0.6	120.6
	Spain	33,478	0.4	125.5	40,852	0.5	122.0	42,484	0.6	104.0	44,076	0.5	103.7	20,814	0.3	47.2	35,207	0.4	169.2	44,461	0.4	126.3
	Netherlands	33,290	0.4	108.8	34,487	0.4	103.6	31,186	0.5	90.4	32,837	0.4	105.3	23,450	0.4	71.4	30,266	0.4	129.1	33,861	0.3	111.9
	Sweden	29,792	0.4	117.8	30,129	0.4	101.1	26,384	0.4	87.6	29,188	0.3	110.6	21,806	0.3	72.2	30,458	0.4	139.7	36,206	0.3	118.9
	Switzerland	23,996	0.3	106.6	24,364	0.3	101.5	23,091	0.3	94.8	26,005	0.3	112.6	16,410	0.3	63.1	24,329	0.3	148.3	28,322	0.3	116.4
	Belgium	14,828	0.2	112.9	15,773	0.2	106.4	13,899	0.2	88.1	15,981	0.2	115.0	10,708	0.2	67.0	14,608	0.2	136.4	16,558	0.2	113.3
	Denmark	14,305	0.2	110.1	14,486	0.2	101.3	13,116	0.2	90.5	14,606	0.2	111.4	10,821	0.2	74.1	13,594	0.2	125.6	15,065	0.1	110.8
	Ireland	13,681	0.2	108.4	12,513	0.1	91.5	10,450	0.2	83.5	10,738	0.1	102.8	8,294	0.1	77.2	10,358	0.1	124.9	11,258	0.1	108.7
	Other	110,970	1.3	113.9	111,255	1.3	100.3	99,513	1.5	89.4	106,468	1.2	107.0	72,839	1.2	69.1	101,739	1.2	139.7	122,205	1.2	120.1
	Subtotal	877,531	10.5	110.0	886,723	10.6	101.0	800,085	11.8	90.2	853,166	9.9	106.6	569,279	9.2	66.7	775,840	9.3	136.3	904,132	8.7	116.5
Africa		23,408	0.3	106.9	24,498	0.3	104.7	20,621	0.3	84.2	22,665	0.3	109.9	19,361	0.3	85.4	24,725	0.3	127.7	26,697	0.3	108.0
Asia	South Korea	2,600,694	31.2	122.8	2,382,397	28.5	91.6	1,586,772	23.4	66.6	2,439,816	28.3	153.8	1,658,073	26.7	68.0	2,042,775	24.4	123.2	2,456,165	23.7	120.2
	China	942,439	11.3	116.1	1,000,416	12.0	106.2	1,006,085	14.8	100.6	1,412,875	16.4	140.4	1,043,246	16.8	73.8	1,425,100	17.1	136.6	1,314,437	12.7	92.2
	Taiwan	1,385,255	16.6	105.8	1,390,228	16.6	100.4	1,024,292	15.1	73.7	1,268,278	14.7	123.8	993,974	16.0	78.4	1,465,753	17.5	147.5	2,210,821	21.3	150.8
	Hong Kong	432,042	5.2	122.6	550,190	6.6	127.3	449,568	6.6	81.7	508,691	5.9	113.2	364,865	5.9	71.7	481,665	5.8	132.0	745,881	7.2	154.9
	Thailand	167,481	2.0	133.2	191,881	2.3	114.6	177,541	2.6	92.5	214,881	2.5	121.0	144,969	2.3	67.5	260,640	3.1	179.8	453,642	4.4	174.0
	Singapore	151,860	1.8	131.1	167,894	2.0	110.6	145,224	2.1	86.5	180,960	2.1	124.6	111,354	1.8	61.5	142,201	1.7	127.7	189,280	1.8	133.1
	Malaysia	100,890	1.2	117.8	105,663	1.3	104.7	89,509	1.3	84.7	114,519	1.3	127.9	81,516	1.3	71.2	130,183	1.6	159.7	176,521	1.7	135.6
	Indonesia	64,178	0.8	107.1	66,593	0.8	103.8	63,617	0.9	95.5	80,632	0.9	126.7	61,911	1.0	76.8	101,460	1.2	163.9	136,797	1.3	134.8
	Philippines	89,532	1.1	93.7	82,177	1.0	91.8	71,485	1.1	87.0	77,377	0.9	108.2	63,099	1.0	81.5	85,037	1.0	134.8	108,351	1.0	127.4
	India	67,583	0.8	108.1	67,323	0.8	99.6	58,918	0.9	87.5	66,819	0.8	113.4	59,354	1.0	88.8	68,914	0.8	116.1	75,095	0.7	109.0
	Other	128,329	1.5	115.0	149,065	1.8	116.2	140,990	2.1	94.6	163,584	1.9	116.0	141,300	2.3	86.4	184,249	2.2	130.4	248,799	2.4	135.0
	Subtotal	6,130,283	73.4	116.8	6,153,827	73.7	100.4	4,814,001	70.9	78.2	6,528,432	75.8	135.6	4,723,661	76.0	72.4	6,387,977	76.4	135.2	8,115,789	78.3	127.0
Oceania	Australia	222,518	2.7	114.1	242,031	2.9	108.8	211,659	3.1	87.5	225,751	2.6	106.7	162,578	2.6	72.0	206,404	2.5	127.0	244,569	2.4	118.5
	New Zealand	34,737	0.4	107.4	33,682	0.4	97.0	31,567	0.5	93.7	32,061	0.4	101.6	23,996	0.4	74.8	31,853	0.4	132.7	36,954	0.4	116.0
	Other	3,533	0.0	106.6	3,275	0.0	92.7	2,987	0.0	91.2	3,060	0.0	102.4	2,576	0.0	84.2	3,256	0.0	126.4	3,363	0.0	103.3
	Subtotal	260,788	3.1	113.0	278,988	3.3	107.0	246,213	3.6	88.3	260,872	3.0	106.0	189,150	3.0	72.5	241,513	2.9	127.7	284,886	2.7	118.0
No nationality		940	0.0	89.7	1,107	0.0	117.8	640	0.0	57.8	663	0.0	103.6	493	0.0	74.4	498	0.0	101.0	489	0.0	98.2
Total		8,346,969	100.0	113.8	8,350,835	100.0	100.0	6,789,658	100.0	81.3	8,611,175	100.0	126.8	6,218,752	100.0	72.2	8,358,105	100.0	134.4	10,363,904	100.0	124.0

(Note) Compiled by the JTA based on Japan National Tourism Organization (JNTO) data.

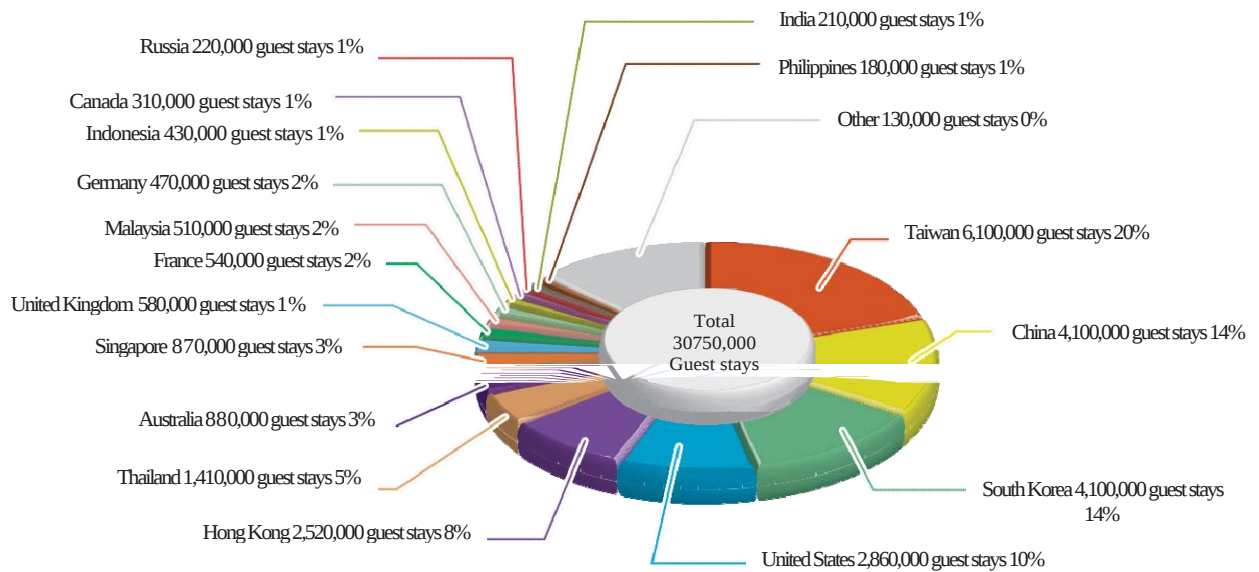
Data 28

Number of Foreign Visitors to Japan by Country/Region



Data 29

Number of Foreign National Accommodation Guests by Country/Region (2013)



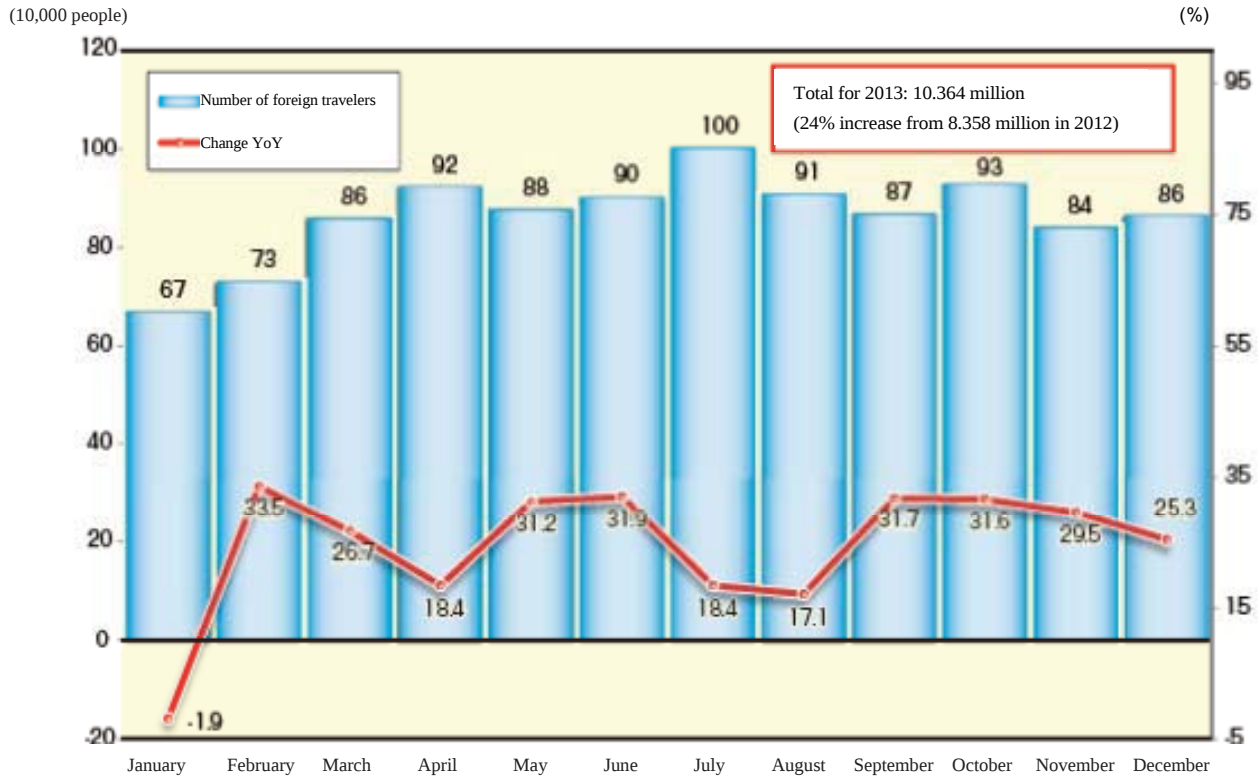
(Note) 1 Data based on the JTA's "Accommodation Survey."

2 "Foreign national" refers to someone that does not maintain an address in Japan.

3 Created based on survey of accommodation facilities with more than 10 employees.

4 Data does not reflect new openings or closures during the year. Annual revision values will vary slightly.

Data 30 Number of Foreign Visitors to Japan by Month (2013)



(Note) Compiled by the JTA based on Japan National Tourism Organization data.

Data 31 Top Destinations for Foreign Visitors to Japan by Prefecture

(%)

	2007	2008	2009	2010	2011	2012	2013
1	Tokyo 58.2	Tokyo 58.9	Tokyo 58.8	Tokyo 60.3	Tokyo 50.6	Tokyo 51.3	Tokyo 47.3
2	Osaka 25.8	Osaka 25.0	Osaka 24.4	Osaka 26.1	Osaka 25.2	Osaka 24.0	Osaka 25.1
3	Kyoto 21.8	Kyoto 21.4	Kyoto 20.6	Kyoto 24.0	Kyoto 16.7	Kyoto 17.3	Kyoto 18.9
4	Kanagawa 16.3	Kanagawa 16.0	Kanagawa 16.7	Kanagawa 17.8	Kanagawa 11.8	Kanagawa 12.7	Kanagawa 11.2
5	Chiba 11.4	Chiba 11.8	Chiba 12.7	Chiba 15.0	Fukuoka 9.7	Chiba 9.8	Chiba 9.6
Total Visitor Rate	235.0	234.3	230.2	248.4	192.9	198.8	201.5

(Note) 1 Compiled based on the Ministry of Land, Infrastructure, Transport and Tourism's "Consumption Trend Survey for Foreigners Visiting Japan" and the Japan National Tourist Organization's (JNTO) "Visitor Arrivals Survey 2011".

2 The visitor rate is calculated by dividing the number of people responding that they "visited the certain area during their trip" by the total number of responses multiplied by 100.

3 Total visitor rate is calculated by adding the visitor rate of each prefecture. The total does not become 100% because more than one destination was selected by a person.

4 Data is for fiscal years until 2007. Data is for calendar years for 2011 and beyond.

5 Data cannot be directly compared with past results because the JNTO's "Visitor Arrivals Survey" is used up to 2010 and the JTA's "Consumption Trend Survey for Foreigners Visiting Japan" is used for 2011 and beyond.

Data 32 Number of Foreign Visitors to Japan by Purpose

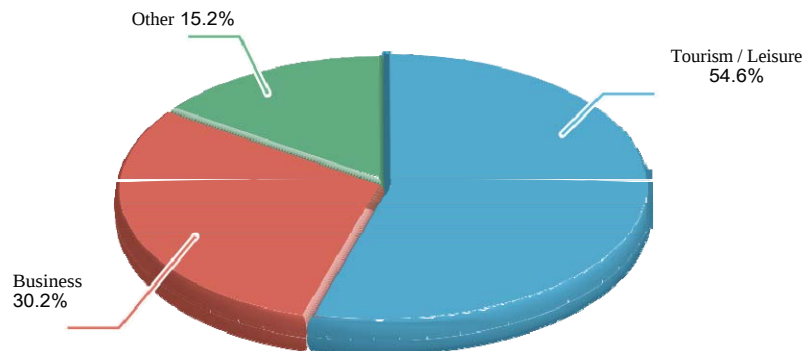
(Persons)

Persons	Total	Tourists	Business Travelers and Others
2007	8,346,969 [100.0] (113.8)	5,954,180 [71.3] (118.3)	2,392,789 [28.7] (104.0)
2008	8,350,835 [100.0] (100.0)	6,048,681 [72.4] (101.6)	2,302,154 [27.6] (96.2)
2009	6,789,658 [100.0] (81.3)	4,759,833 [70.1] (78.7)	2,029,825 [29.9] (88.2)
2010	8,611,175 [100.0] (126.8)	6,361,974 [73.9] (133.7)	2,249,201 [26.1] (110.8)
2011	6,218,752 [100.0] (72.2)	4,057,235 [65.2] (63.8)	2,161,517 [34.8] (96.1)
2012	8,358,105 [100.0] (134.4)	6,041,645 [72.3] (148.9)	2,316,460 [27.7] (107.2)
2013	10,363,904 [101.0] (124.0)	7,962,517 [76.8] (131.8)	2,401,387 [23.2] (103.7)

(Note) 1 Prepared by the JTA based on Japan National Tourism Organization (JNTO) data.

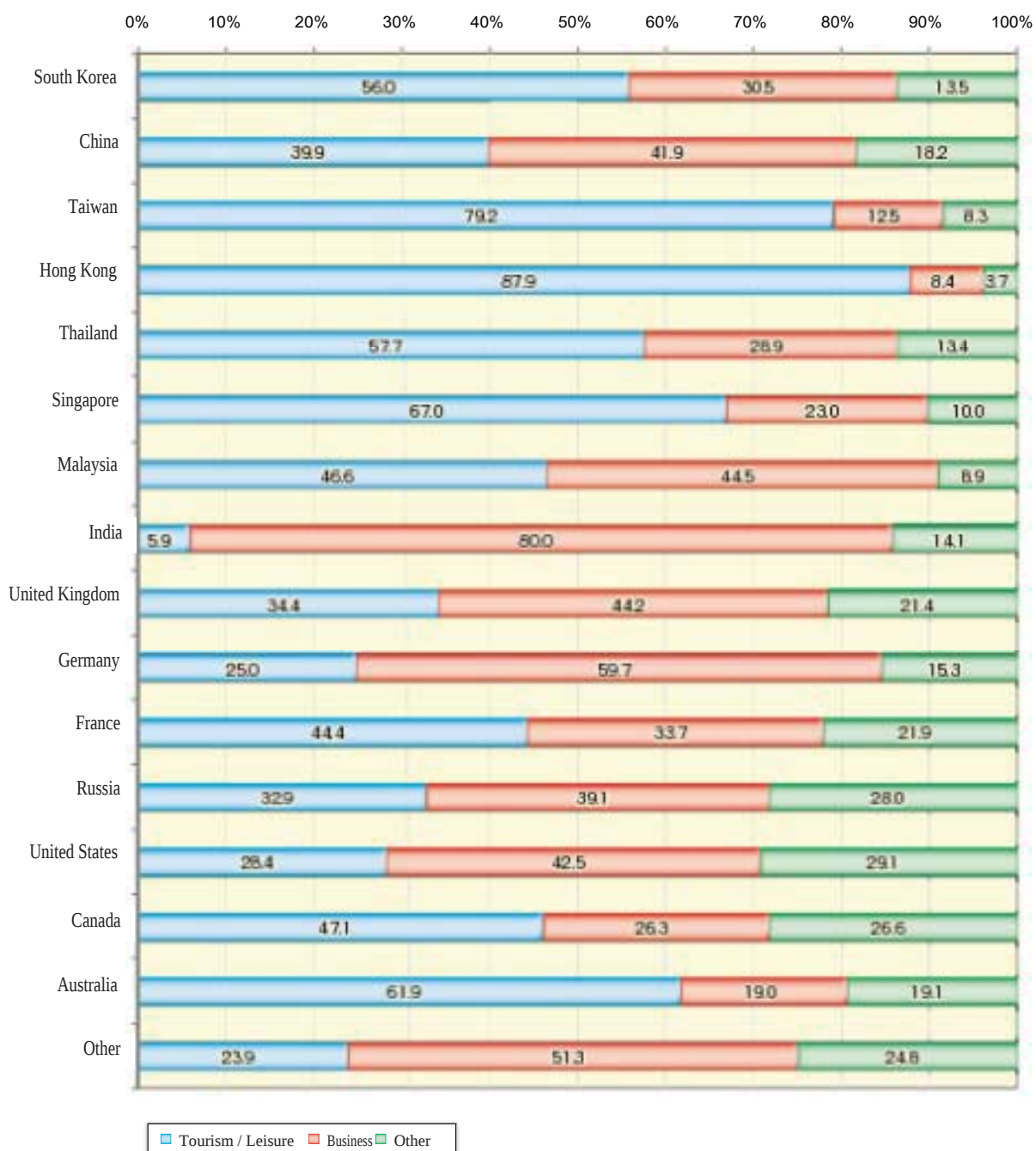
2 Brackets indicate share, while parentheses show year on year change.

Data 33 Number of Foreign Visitors to Japan by Purpose (2013)



(Note) Created by the JTA based on "Consumption Trend Survey for Foreigners Visiting Japan".

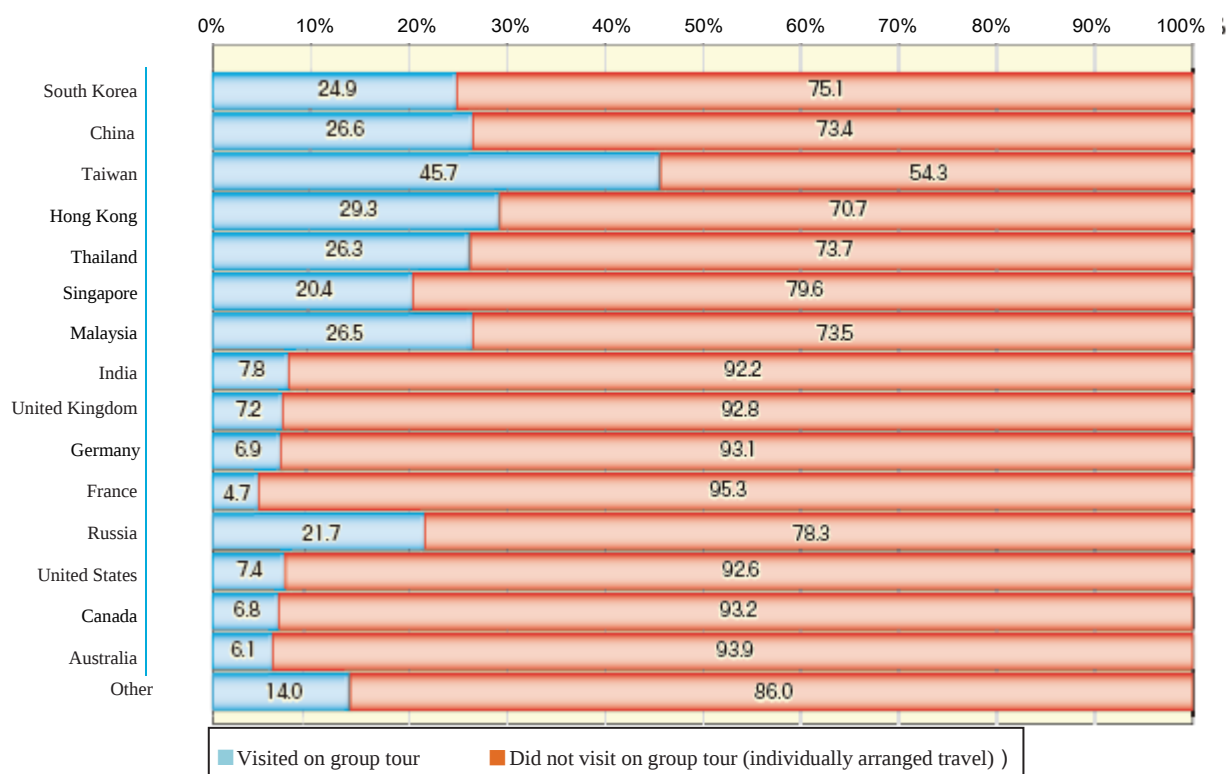
Data 34 Share of Foreign Visitors to Japan by Purpose and by Country / Region (2013)



(Note) Created by the JTA based on "Consumption Trend Survey for Foreigners Visiting Japan".

Data 35

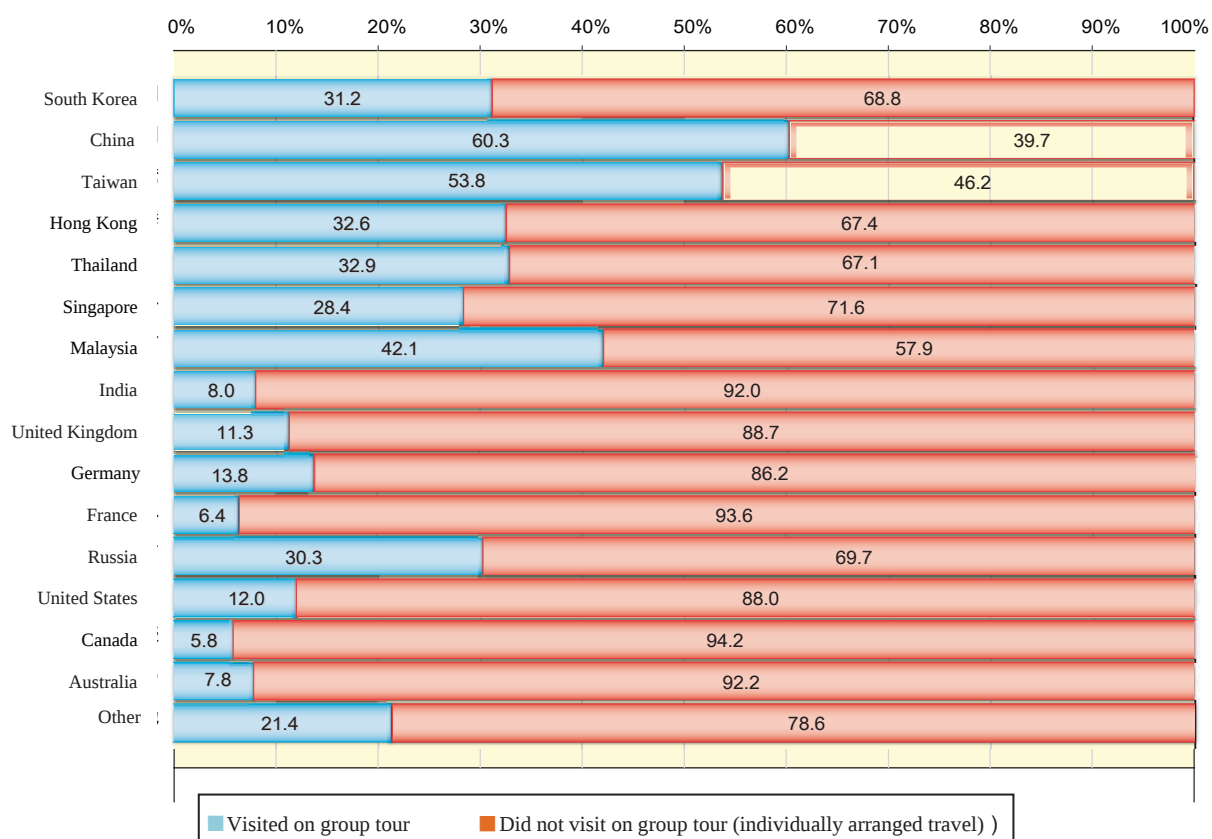
Share of Foreign Visitors to Japan by Travel Format and by Country / Region (All purposes) (2013)



(Note) Created by the JTA based on "Consumption Trend Survey for Foreigners Visiting Japan".

Data 36

Share of Foreign Visitors to Japan by Travel Format and by Country / Region (Tourism/Leisure) (2013)



(Note) Created by the JTA based on "Consumption Trend Survey for Foreigners Visiting Japan".

Data 37 Passenger Traffic of Inbound Foreign National Travelers

(1,000 people)

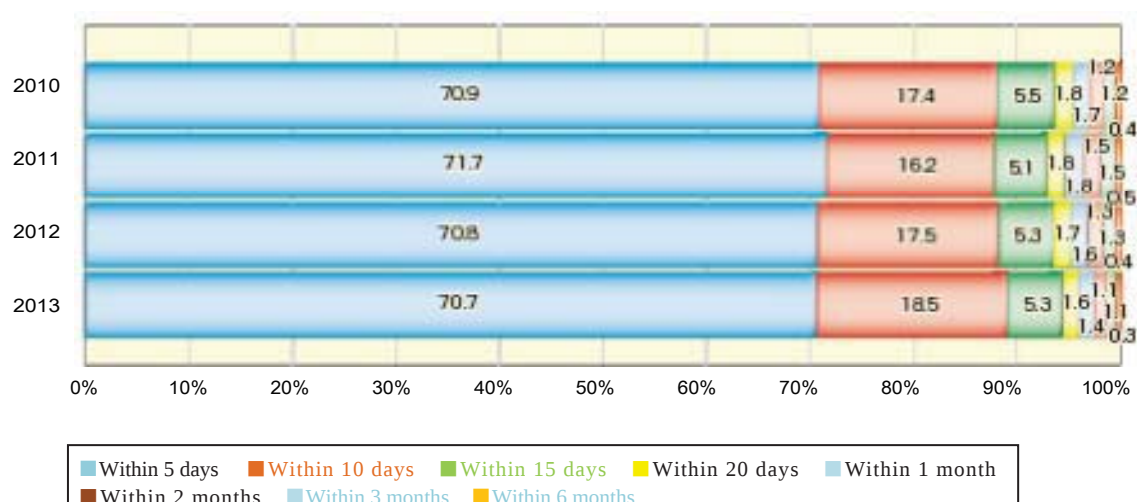
Year	Subtotal	By air								By sea	Total
		New Chitose	Narita	Haneda	Chubu	Kansai	Fukuoka	Naha	Other regional airports		
2007	8,486	301	4,376	441	596	1,647	433	84	608	666	9,152
	(92.7)	(3.3)	(47.8)	(4.8)	(6.5)	(18.0)	(4.7)	(0.9)	(6.6)	(7.3)	(100.0)
2008	8,448	311	4,283	533	596	1,641	426	106	550	698	9,146
	(92.4)	(3.4)	(46.8)	(5.8)	(6.5)	(17.9)	(4.7)	(1.2)	(6.0)	(7.6)	(100.0)
2009	7,147	298	3,789	512	415	1,349	320	88	376	435	7,581
	(94.3)	(3.9)	(50.0)	(6.8)	(5.5)	(17.8)	(4.2)	(1.2)	(5.0)	(5.7)	(100.0)
2010	8,741	363	4,196	751	507	1,745	484	140	555	703	9,444
	(92.6)	(3.8)	(44.4)	(8.0)	(5.4)	(18.5)	(5.1)	(1.5)	(5.9)	(7.4)	(100.0)
2011	6,682	290	2,820	908	417	1,339	407	163	338	453	7,135
	(93.6)	(4.1)	(39.5)	(12.7)	(5.8)	(18.8)	(5.7)	(2.3)	(4.7)	(6.4)	(100.0)
2012	8,567	390	3,562	1,098	476	1,792	561	231	458	605	9,172
	(93.4)	(4.3)	(38.8)	(12.0)	(5.2)	(19.5)	(6.1)	(2.5)	(5.0)	(6.6)	(100.0)
2013	10,637	506	4,263	1,293	574	2,323	687	374	616	618	11,255
	(94.5)	(4.5)	(37.9)	(11.5)	(5.1)	(20.6)	(6.1)	(3.3)	(5.5)	(5.5)	(100.0)

(Note) 1 Compiled by the JTA based on Ministry of Justice documents.

2 Values in parentheses indicates share (percentage).

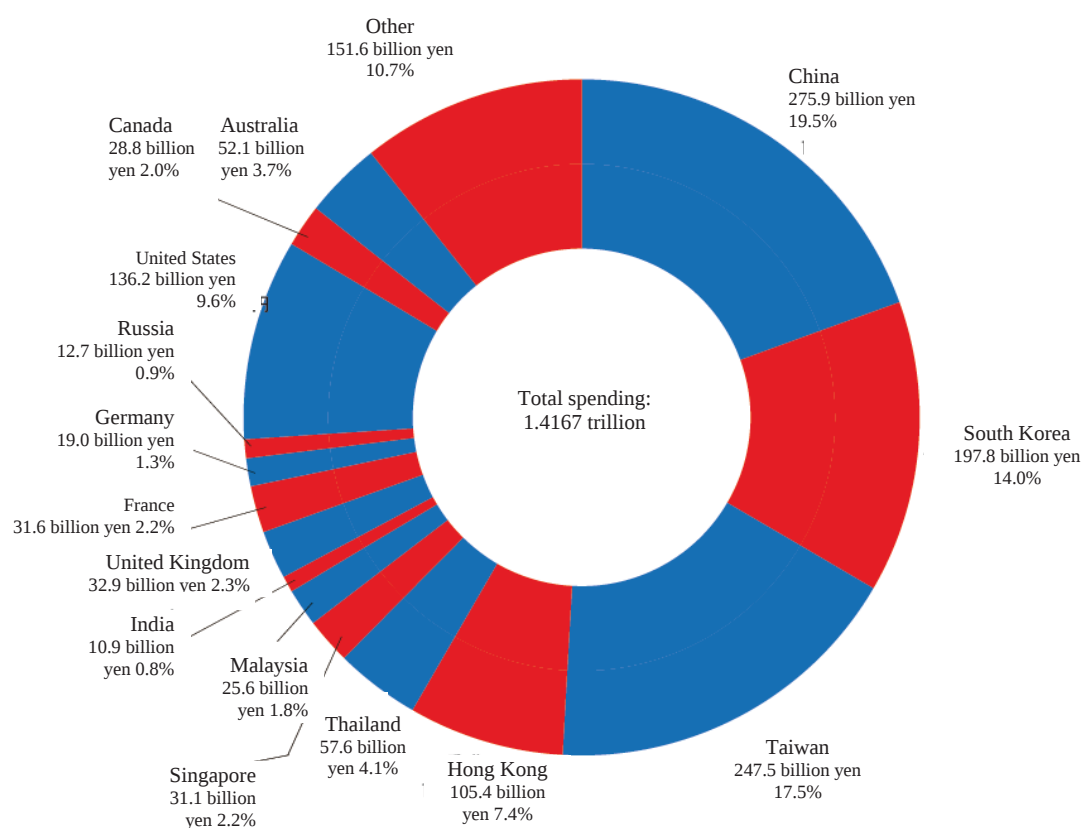
3 The number of foreign national travelers in Figure I-11 does not match the above table because it subtracts the number of foreign national residing in Japan from the number legally admitted in Ministry of Justice data in accordance with nationality and then adds the number of foreign national travelers landing in Japan on a temporary basis.

Data 38 Foreign National Visitors to Japan by Duration of Stay



(Note) 1 Compiled by the JTA based on Ministry of Justice documents.

2 The above values represent data for the number of foreign national travelers admitted to Japan for durations of less than six months.

Data 39
Spending of Foreign National Visitors to Japan by Country/Region (2013)


(Note)1 Created by the JTA based on "Consumption Trend Survey for Foreigners Visiting Japan".

2 Values are preliminary.

Data 40
Total Travel Spending per Person by Foreign Visitors to Japan

		Yen / person		
		Pre-travel spending (costs of package tour / roundtrip)	Spending during travel (in Japan)	Total spending
Foreign tourists visiting Japan (all nationalities)	2010	94,946	113,005	207,952
	2011	86,820	113,917	200,737
	2012	86,823	111,983	198,806
	2013	100,687	115,837	216,524
Visitors on package tours	2010	121,039	68,191	189,230
	2011	99,845	59,929	159,773
	2012	106,102	63,619	169,720
	2013	120,814	62,991	183,805
Visitors on individually arranged trips	2010	82,815	135,860	218,675
	2011	81,384	139,828	221,211
	2012	79,277	134,551	213,827
	2013	91,884	141,929	233,813

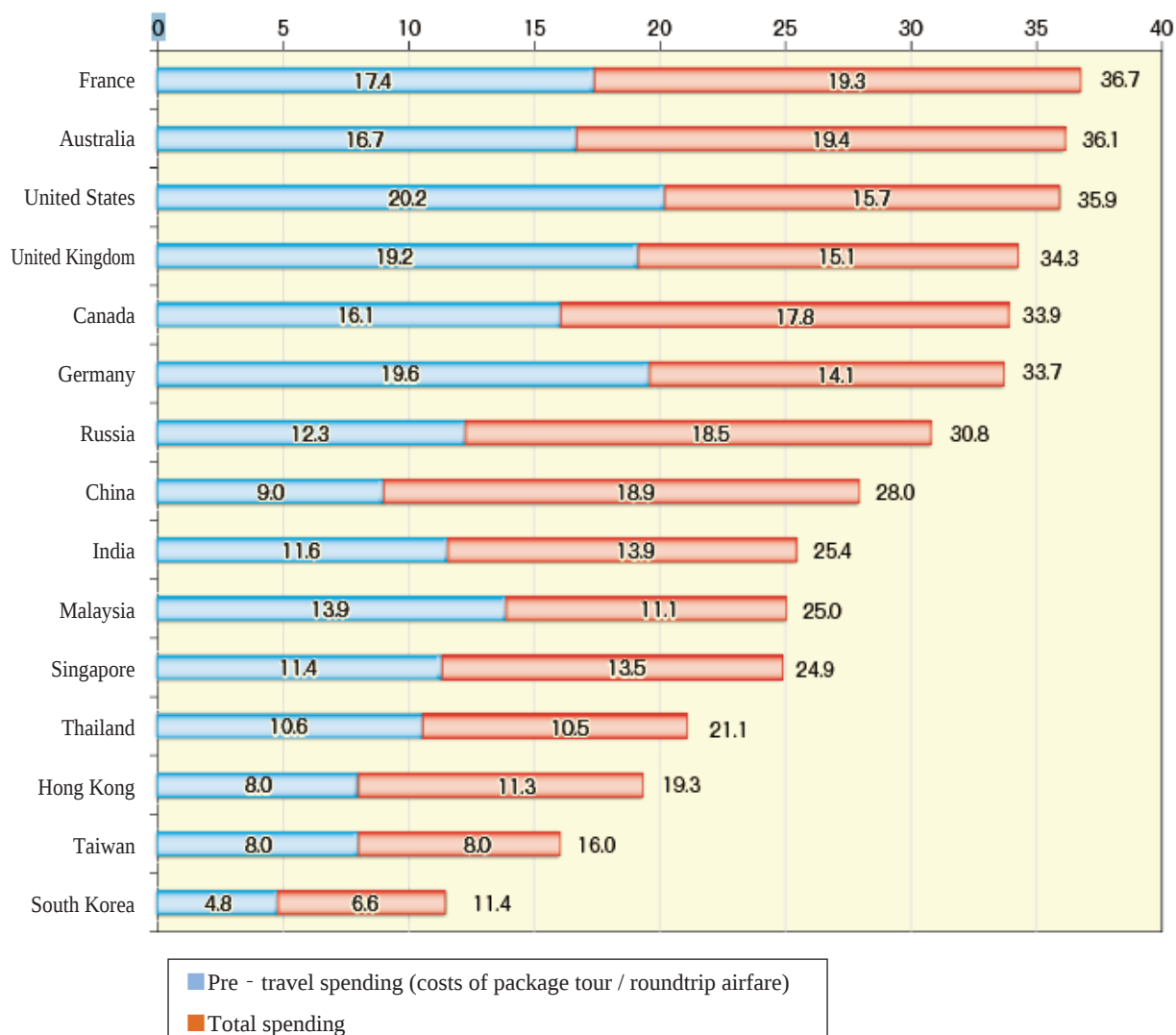
(Note) 1 Created by the JTA based on "Consumption Trend Survey for Foreigners Visiting Japan".

2 For 2011, survey was began in the April-to-June quarter.

Data 41

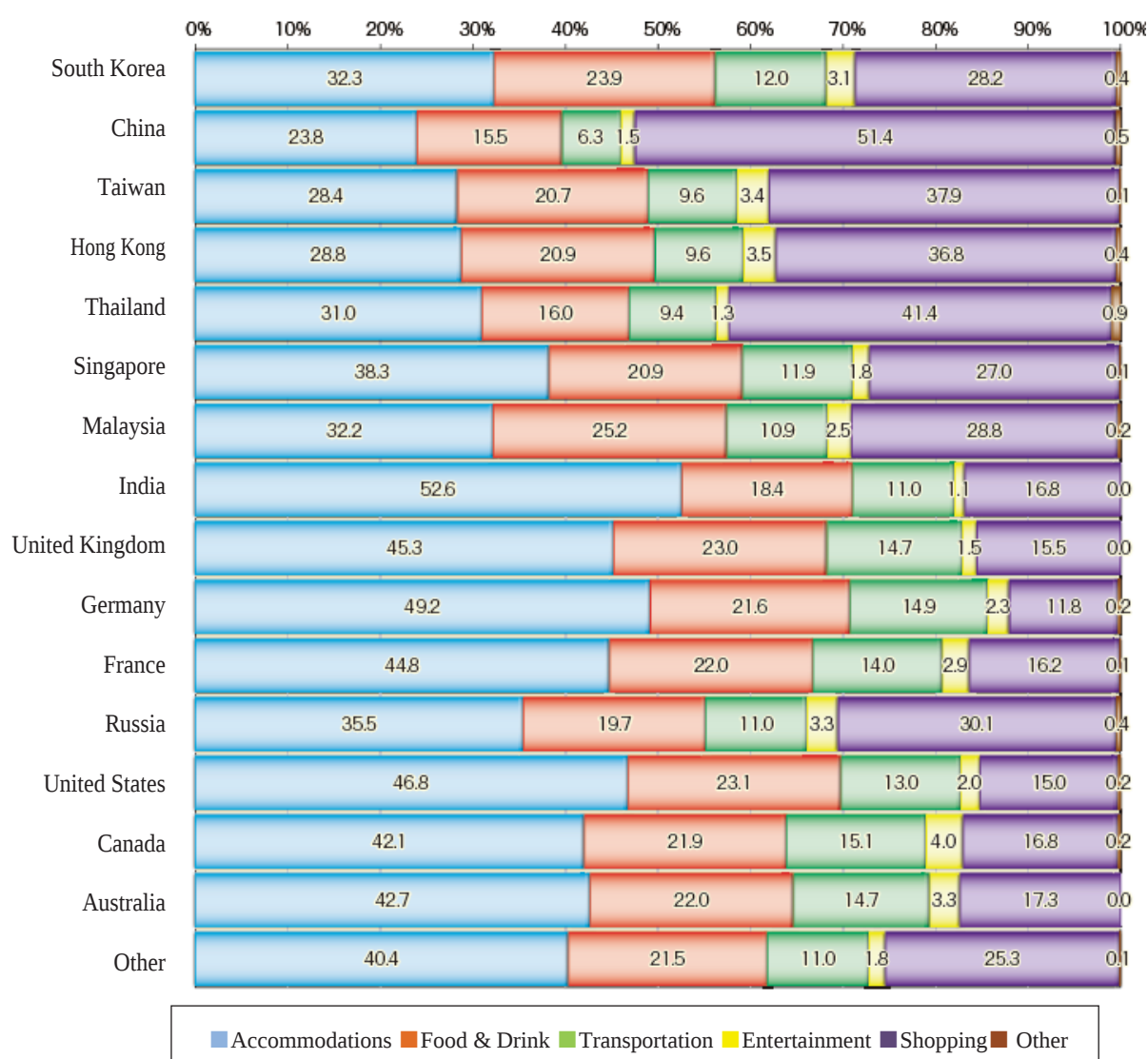
Total Spending per Person by Foreign Visitors to Japan by Country / Region (2013)

(10,000 yen)



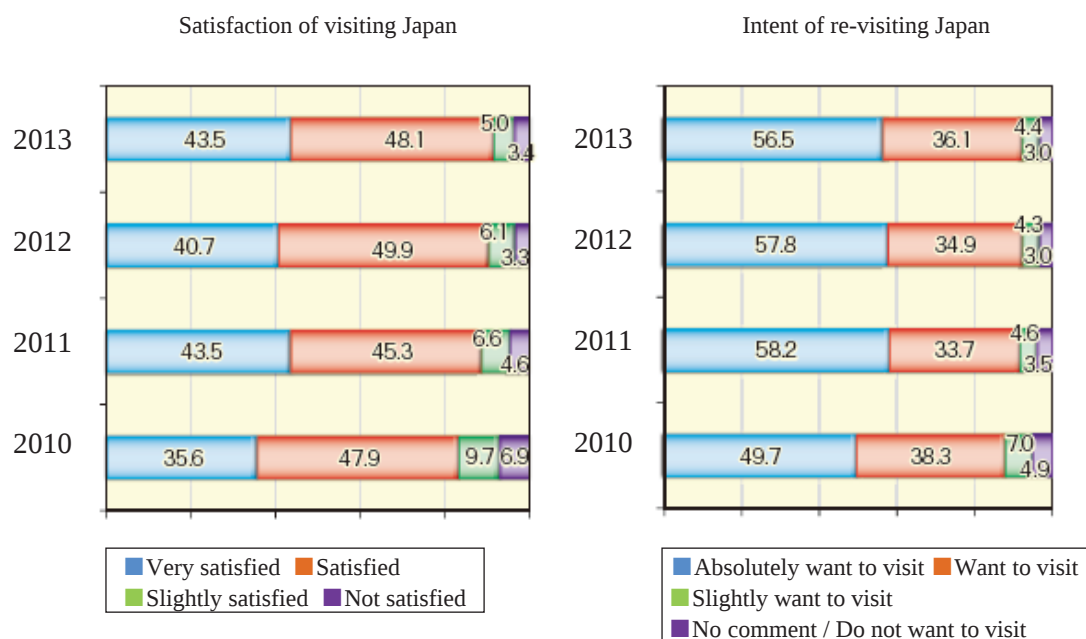
(Note) Created by the JTA based on "Consumption Trend Survey for Foreigners Visiting Japan".

Data 42 Breakdown of Foreign visitors Spending in Japan by Country / Region (2013)



(Note) 1 Created by the JTA based on Consumption Trend Survey for Foreigners Visiting Japan.
 2 Travel spending includes the amount paid in Japan as part of a package tour fee added to the amount spent while in Japan.

Data 43 Satisfaction and Intent of Re-visiting Japan of Foreign Visitors



(Note) Created by the JTA based on Consumption Trend Survey for Foreigners Visiting Japan.

Data 44 Spending of Japanese Travelers Per Person Per Trip

(Yen/Person per Trip)

		2010	2011	2012
Domestic travel	Overnight trip	48,412	47,149	47,444
	Tourism/recreation	53,993	53,166	52,938
	Hometown visit / Visit friends etc.	39,830	38,787	39,148
	Business	45,573	42,963	43,923
	Same-Day trip	16,122	16,567	14,972
	Tourism/recreation	16,588	16,314	15,211
	Hometown visit / Visit friends etc.	17,783	17,730	15,607
	Business	13,085	16,357	13,587
		246,457	249,522	242,340
Overseas travel	Tourism/recreation	247,278	241,758	240,941
	Hometown visit / Visit friends etc.	267,650	214,820	231,738
	Business	232,663	280,674	250,122

(Note) 1 Created by the JTA based on the Japan National Tourism Survey

2 Overseas travel spending includes amount spent in Japan and during the period of overseas travel.

Data 45 Estimated Travel Spending (2012)

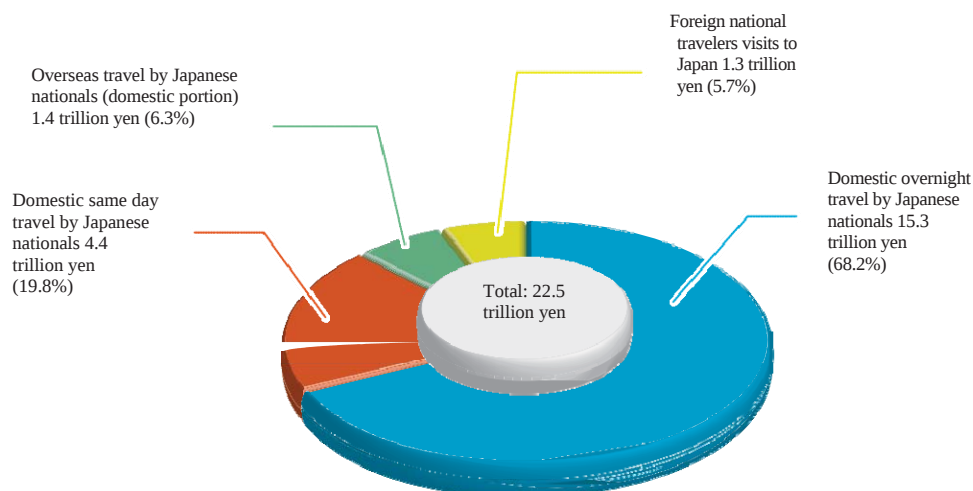
(Billions of yen)

	a	b	c	d=a+b+c	e	f=d+e
Cost	Overnight travel (domestic)	Same- day trips (domestic)	Overseas travel (domestic portion)	Travel spending by Japanese nationals (domestic portion)	Foreign visitors' travel	Travel spending in Japan
Travel spending (during and before/after travel)	15,323	4,444	1,424	21,192	1,293	22,484
Change YoY	1.4%	-10.1%	7.0%	-0.9%	29.6%	0.4%
Spending before/after travel	2,245	775	403	3,423		
Before travel	2,119	727	387	3,232		
After travel	126	48	16	191		
Spending during travel	12,672	3,669	1,022	17,363		
Travel company income	234	33	163	429		
Transportation	4,978	1,856	740	7,574		
Accommodations	3,257	0	26	3,283		
Food and beverage	1,622	501	19	2,142		
Gifts and shopping	1,876	867	55	2,798		
Facility admissions fees	521	364	0	885		
Other	184	48	19	251		
Vacation home rent	406	0	0	406		

g	h=d+g
Overseas travel (overseas portion)	Travel spending by Japanese nationals(including
3,274	24,466

(Note) Created by the JTA based on the Research Study on Economic Impacts of Tourism in Japan.

Data 46 Breakdown of Domestic Travel Spending by Market (2012)



(Note) Created by the JTA based on the Survey on Travel / Tourist and the Bank of Japan's "Balance of Payments" (revised annually)

Data 47 Economic Impacts of Travel Spending in Japan (2012)

	Tourism expenditure	(Trillions of yen)			(Trillions of yen)			(10,000 persons)		
		Direct effect	Ripple effect (direct + primary induced effect)	Ripple effect (direct + primary and secondary induced effect)	Direct effect	Ripple effect (direct + primary induced effect)	Ripple effect (direct + primary and secondary induced effect)	Direct effect	Ripple effect (direct + primary induced effect)	Ripple effect (direct + primary and secondary induced effect)
Economic ripple effect from travel/tourism spending in Japan (2012)	22.5	21.5	37.3	46.7	10.9	18.6	23.8	213	325	399
Ratio to all industries*		2.4%	4.1%	5.1%	2.3%	3.9%	5.0%	3.3%	5.0%	6.2%
Multiplier factor (ripple effect/direct effect)			1.7	2.2		1.7	2.2		1.5	1.9
2011 estimates	22.4	21.4	37.0	46.4	10.8	18.5	23.7	213	323	397
Change YoY (2012/2011)	0.4%	0.5%	0.7%	-4.7%	-5.3%	-4.7%	0.5%	-5.3%	0.5%	-5.0%

*Figures are for all industries

2012 output

905.0 trillion yen

2012 GDP (nominal)

473.8 trillion yen

2012 payroll employment

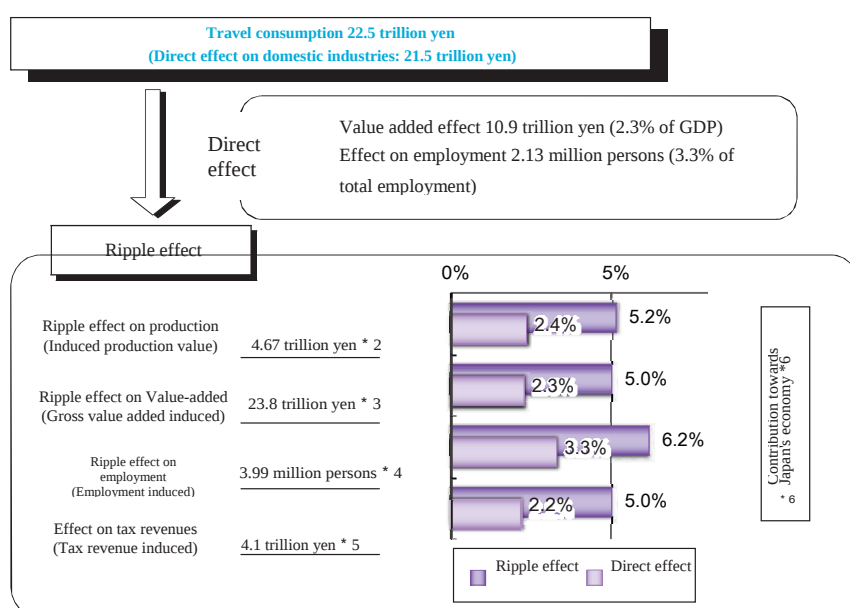
64370,000 people

(Billions of yen)					
		Effective Tax Rate	Direct effect	Ripple effect	
				Direct effect + primary induced effect	Direct +primary and induced secondary induced effect
Indirect taxes		5.0%	542	926	1,187
Direct taxes	Individual	13.5%	786	1,309	1,619
	Corporate	25.0%	450	892	1,258
Total			1,778	3,127	4,064
Share of 2012 tax revenues (78.6 trillion yen)			2.2%	3.9%	5.0%

(Note) 1 Created by the JTA based on the Research Study on Economic Impacts of Tourism in Japan

2 2011 tax revenues represent the total of national tax revenues (paid) and local tax revenues (estimated).

Data 48 Economic Impacts of Travel Spending on Japan (2012)



(Note) 1 Created by the JTA based on the "Research on Economic Impacts of Tourism in Japan".

2 Corresponds to output of 905.0 trillion yen from National Accounts of Japan (2012)

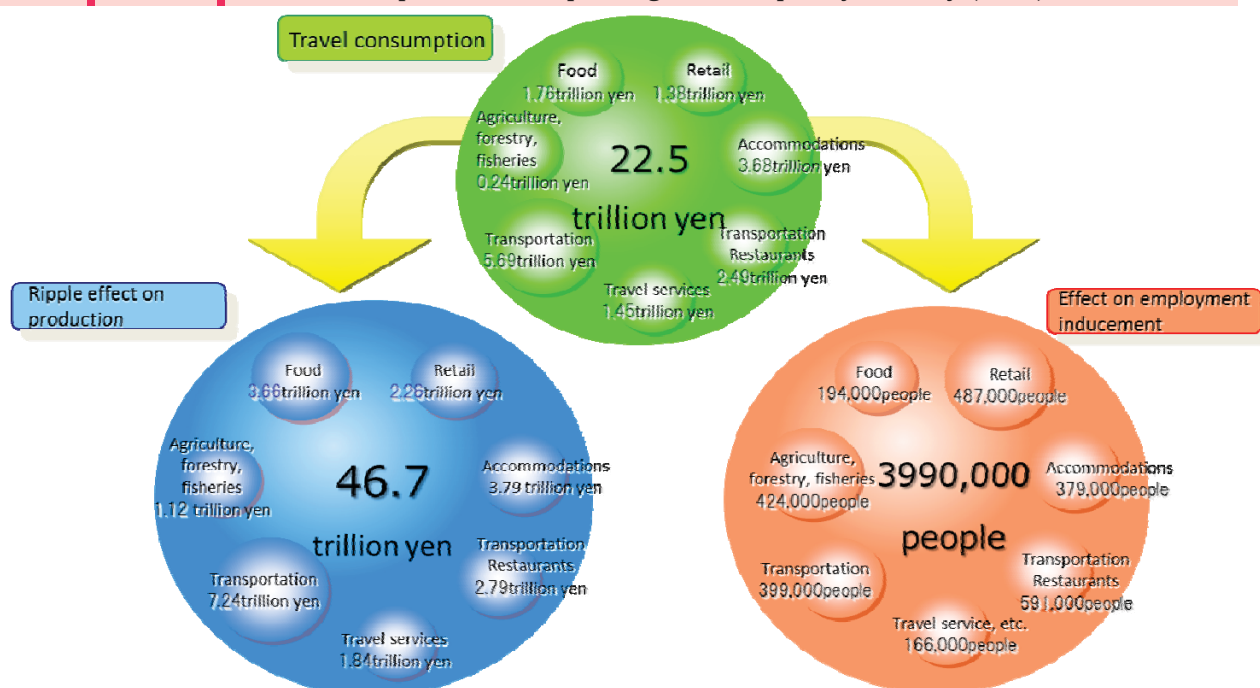
3 Corresponds to nominal GDP of 473.8 trillion yen from National Accounts of Japan (2012)

4 Corresponds to payroll employment of 64.36 million persons from National Accounts of Japan (2012).

5 Corresponds to payroll employment of 80.8 million persons from National Accounts of Japan (2012).

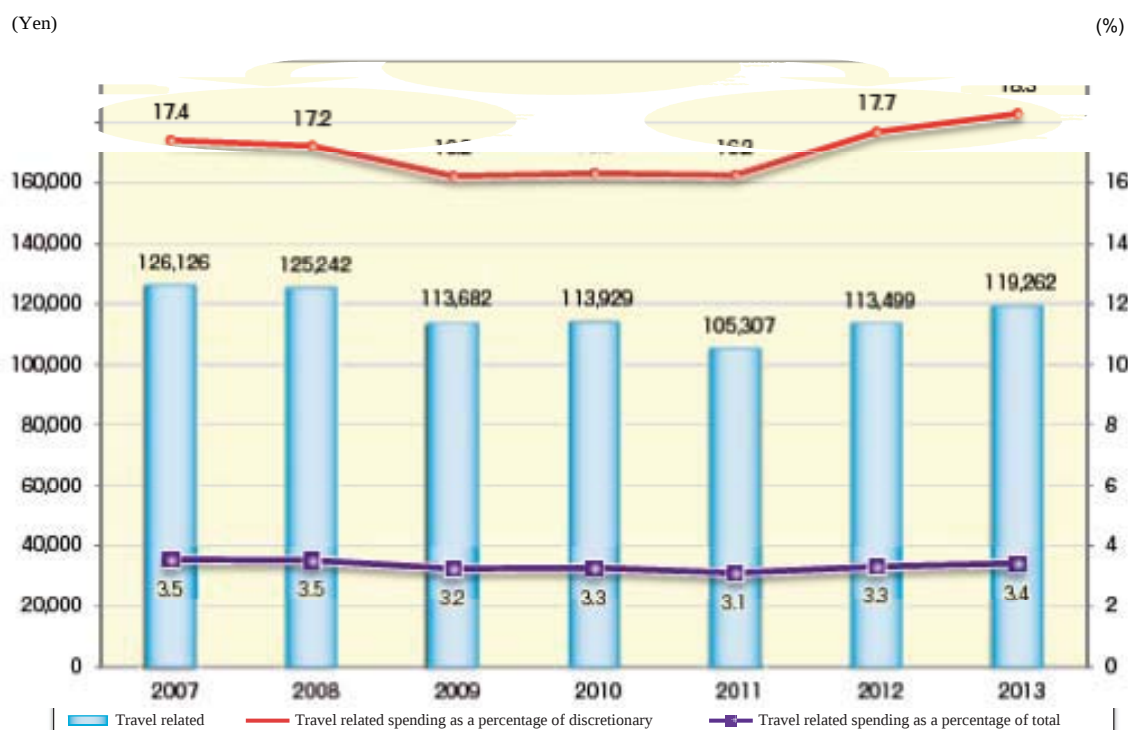
6 The degree of contribution refers to the percentage in all industries.

Data 49 Economic Impacts Travel Spending has on Japan by Industry (2012)



(Note) 1 Created by the JTA based on the "Research Study on Economic Impacts of Tourism in Japan".
 2 The ripple effect on production illustrates the extent of impacts on all industries as a result of new demand. (For example, when travel / tourism spending arises, new production in the overall industry created by an increase in sales and the employees' salary of the company supplying raw materials (intermediate goods) is reflected.)

Data 50 Travel Related Spending



(Note) 1 Compiled by the JTA based on "Household Finances" published by Statistics Japan (households with more than two members [excluding households involved in agriculture, forestry or fisheries]).
 2 Discretionary related spending refers to the amount spent on eating out, durable goods like TV/computer games, educational and entertainment like books, and sports equipment, etc.
 3 Travel related spending refers to the amount spent on accommodations (hotels and package tours), transportation (railway fares, airfare, toll roads, other transportation), and on travel bags, etc.

Data 51 Passenger Traffic in Japan by Means of Transportation

(Millions of persons)

Category Year		Railway						Airplane	Ferry
			JR			Private			
			Non-train pass (included in total)	Shinkansen (included in total)		Non-train pass (included in total)			
Passengers	2006	22,129	8,740	3,352 (0.7)	303 (0.8)	13,389	5,946 (1.1)	96 (2.0)	3.1 (△6.2)
	2007	22,680	8,924	3,454 (3.1)	313 (3.2)	13,756	6,144 (3.3)	96 (△0.8)	3.0 (△2.1)
	2008	23,021	9,026	3,501 (1.3)	316 (0.8)	13,995	6,294 (2.4)	93 (△2.8)	2.8 (△8.6)
	2009	22,738	8,853	3,373 (△3.6)	290 (△8.2)	13,885	6,208 (△1.4)	84 (△9.6)	2.4 (△13.7)
	2010	22,796	8,876	3,380 (0.2)	295 (2.0)	13,920	6,262 (0.9)	84 (0.5)	2.2 (△6.5)
	2011	22,466	8,755	3,291 (△2.6)	299 (1.2)	13,711	6,091 (△2.7)	78 (△8.0)	2.2 (△1.9)
	2012	23,099	8,957	3,439 (4.5)	320 (7.1)	14,142	6,358 (4.4)	85 (9.4)	2.2 (△0.2)
	2013	23,281	9,019	3,492 (1.5)	329 (2.7)	14,262	6,401 (1.6)	91 (7.2)	2.3 (2.7)

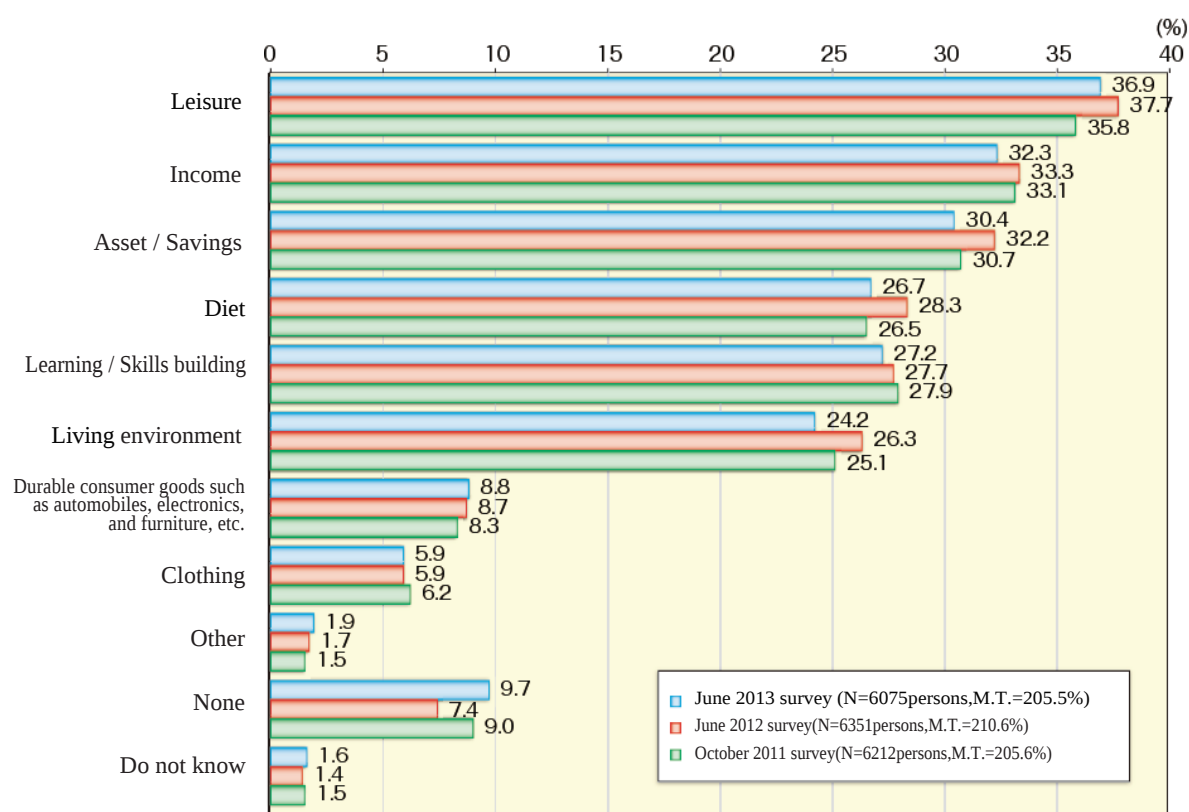
(Note) 1 Created by the JTA based on MLITT Monthly Economic Report (March 2013).

2 Parenthesis indicates the percentage of change year on year.

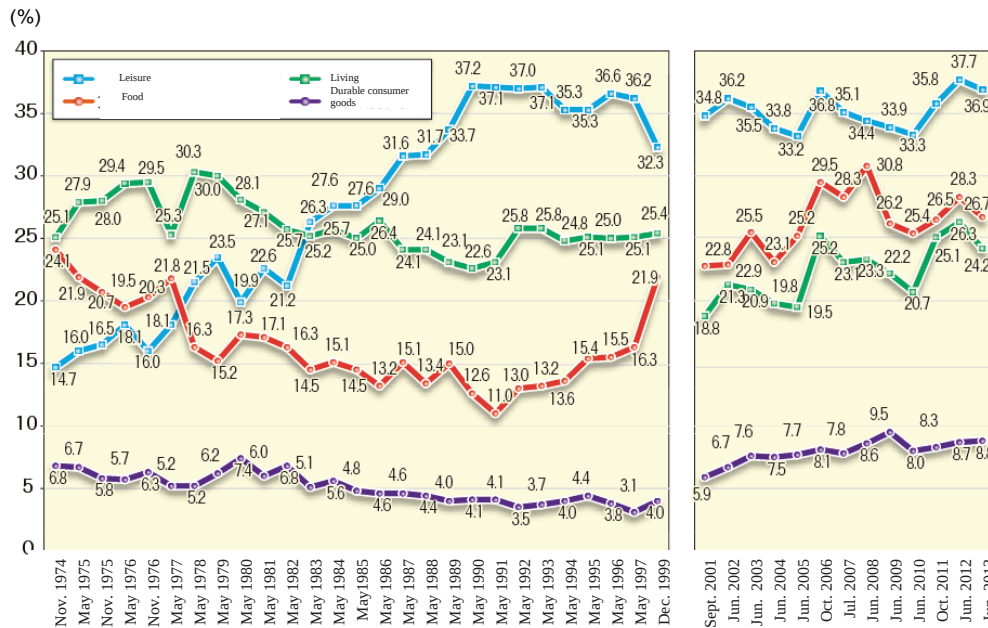
3 2012 data are preliminary.

4 Ferry data for long-distance passenger traffic

Data 52 Main Emphases of Life Going Forward



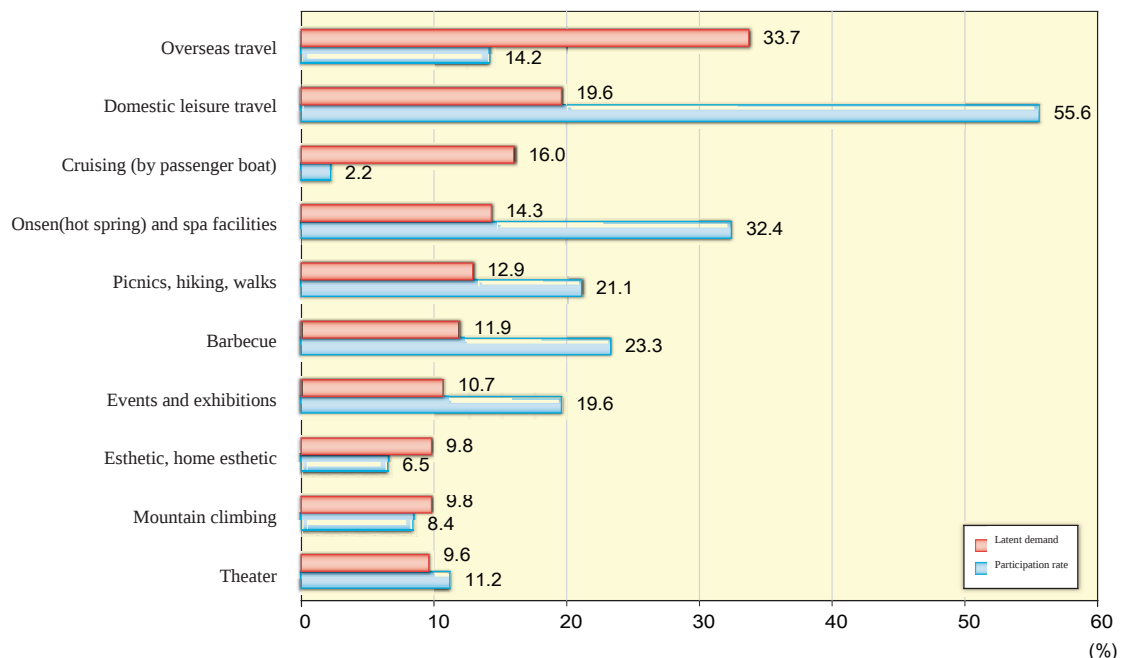
(Note) Data based on the Public Survey about Living for Citizen published by the Public Relations Office.



(Note) 1 Data based on the "Public Survey about Living for Citizen" published by the Public Relations Office.

2 Durable consumer goods refer to automobiles, electronics and furniture, etc.

3 Direct comparisons cannot be drawn between past surveys because prior to 1999 only one response was allowed, but multiple responses were made after 2001.



(Note) Data based on the "White Paper of Leisure 2013" published by the Japan Productivity Center.

Data 55 | Satisfaction with Current Life Style (2013)

	Applicable persons	Satisfaction	Satisfied	Overall satisfied	Dissatisfied	Somewhat dissatisfied	Dissatisfied	Neither	Don't know
Unit	Persons	%	%	%	%	%	%	%	%
Total	6,075	71.0	10.3	60.7	27.6	22.2	5.3	1.1	0.3
[Gender]									
Male	2,813	68.5	9.0	59.4	30.4	23.7	6.6	0.9	0.3
Female	3,262	73.1	11.4	61.7	25.1	20.9	4.2	1.3	0.4
[Age]									
(20 to 29)	461	78.3	16.1	62.3	20.2	17.1	3.0	1.3	0.2
(30 to 39)	761	76.0	10.8	65.2	23.7	20.9	2.8	0.4	-
(40 to 49)	987	66.3	8.4	57.9	32.9	27.1	5.9	0.5	0.3
(50 to 59)	1,015	65.9	7.4	58.5	33.6	25.5	8.1	0.5	-
(60 to 69)	1,411	70.0	9.1	60.8	28.0	22.9	5.1	1.6	0.4
Over 70	1,440	73.8	12.7	61.0	23.7	18.3	5.3	1.8	0.8
[Gender / Age]									
Male	2,813	68.5	9.0	59.4	30.4	23.7	6.6	0.9	0.3
(20 to 29)	227	77.1	17.2	59.9	21.6	17.2	4.4	1.3	-
(30 to 39)	357	75.1	9.0	66.1	24.9	21.0	3.9	-	-
(40 to 49)	459	64.3	8.7	55.6	34.9	28.3	6.5	0.4	0.4
(50 to 59)	455	62.6	6.4	56.3	37.4	28.1	9.2	-	-
60 to 69	653	67.4	7.0	60.3	30.9	23.9	7.0	1.4	0.3
Over 70	662	69.9	10.3	59.7	27.9	21.1	6.8	1.5	0.6
(Female)	3,262	73.1	11.4	61.7	25.1	20.9	4.2	1.3	0.4
20 to 29	234	79.5	15.0	64.5	18.8	17.1	1.7	1.3	0.4
30 to 39	404	76.7	12.4	64.4	22.5	20.8	1.7	0.7	-
40 to 49	528	68.0	8.1	59.8	31.3	25.9	5.3	0.6	0.2
50 to 59	560	68.6	8.2	60.4	30.5	23.4	7.1	0.9	-
60 to 69	758	72.2	10.9	61.2	25.5	22.0	3.4	1.8	0.5
Over 70	778	77.0	14.8	62.2	20.1	15.9	4.1	2.1	0.9

(Note) 1 Data based on the "Public Survey about Living for Citizen" published by the Public Relations Office (June 2013)

Data 56 JTA Budget (FY2014)

(Millions of yen)

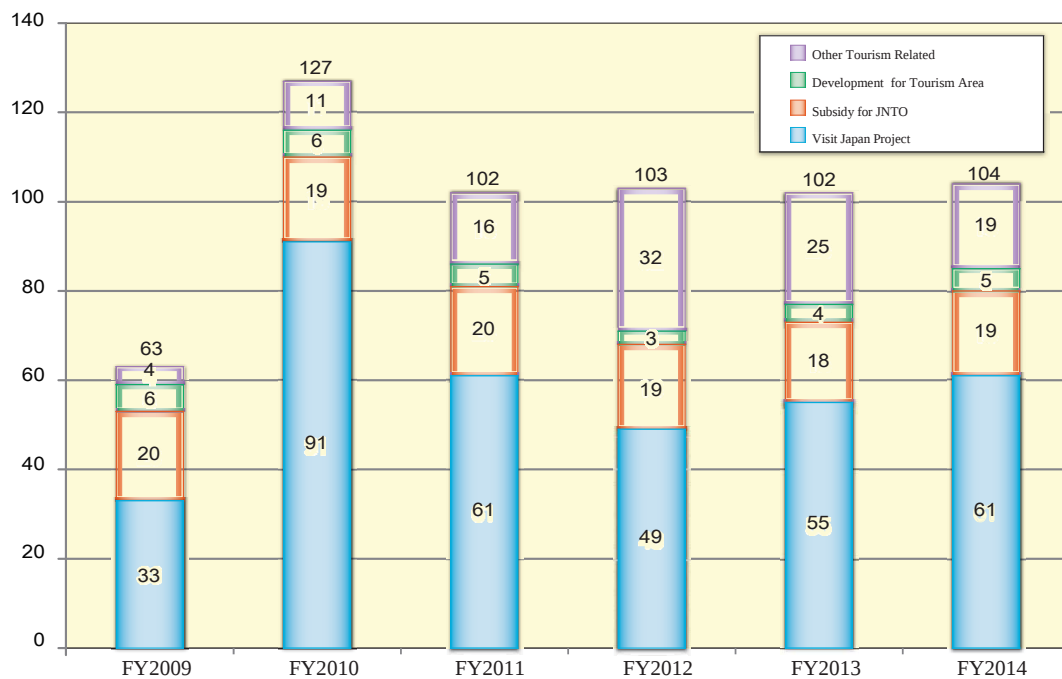
	FY2014 Budget (A)	Previous Year's Budget (B)	Change YoY factor (A/B)
1. Promotion of inbound policy towards increase of foreign visitors	8,497	8,208	1.04
◎ Promotional strategic programs for foreign visitors (Visit Japan Project)	1,202	0	New 0.86
○ Promotional program for international visitors (Visit Japan Project)	4,903	5,686	1.07
○ Promotional program for providing information on accommodation facilities	11	0	New
○ Enhancement and reinforcement of tour guide interpreters system	19	25	0.75
○ Inviting and holding international conferences (MICE)	450	405	1.11
○ Japan National Tourist Organization (JNTO) operating cost subsidy	1,912	1,837	1.04
Exclusive to the previous fiscal year	0	255	New
2. Support tourism region development	522	545	0.96
◎ General support for creating business in tourism areas	72	0	New
○ Tourism region brand support project	274	343	0.80
○ Region tourism environment improvement project	86	99	0.87
○ Tourism region trend survey project	39	38	1.03
○ Tourism region evaluation project	50	49	1.02
Exclusive to the previous fiscal year	0	16	New
3. Travel promotion	60	100	0.60
○ Survey on securing and improving travel safety consideration and investigation	24	25	0.95
○ Universal tourism facilitating project	37	39	0.94
Exclusive to the previous fiscal year	0	36	New
4. Development of tourism statistics	429	518	0.83
5. Other (official cost, etc.)	302	284	1.06
Total	9,811	9,655	1.02
(A budgetary item for promoting top priority subject for new Japan)	1,274	0	)

Total amount including the budgetary item on restoration	10,359	10,232	1.01
--	--------	--------	------

◎ Promoting top priority subject for new Japan

Data 57 JTA Budget

(Hundreds of millions of yen)



1 . Development of general policy for tourism nation

- Formulation and revision of the "Action Program toward the Realization of Japan as a Tourism-Oriented Country"
 - In June, 2013, decision was made in the second Ministerial Meeting on Tourism Nation Promotion. In response to the instruction from the Prime minister, "to achieve a higher goal of 20 million", the revision of the program is under consideration within the government and is scheduled to be completed in June this year.
(Prime minister's official residence website)
<http://www.kantei.go.jp/jp/singi/kankorikkoku/index.html>
(JTA website) http://www.mlit.go.jp/kankocho/category01_000048.html
- Discussion in the Tourism Subcommittee of the Council for Transport Policy
 - From February this year, discussions commenced regarding the direction of policies to achieve the higher goal of 20 million foreign visitors. In June this year, the interim report will be submitted.
(MLIT website) https://www.mlit.go.jp/policy/shingikai/s302_kanko01.html

2. Attracting foreign tourists

- Visit Japan Project
 - In 2013, the governmental goal of 10 million foreign visitors was achieved by active overseas promotion. <https://www.mlit.go.jp/kankocho/shisaku/kokusai/vjc.html>
- Relaxation of visa requirements
 - Relaxation of visa requirement was implemented including visa exemption for travelers from Thailand and Malaysia (July 1, 2013). <http://www.mofa.go.jp/mofaj/toko/visa/>
- Strengthening of the Japan National Tourist Organization (JNTO)
 - In order to implement the Visit Japan projects more effectively, the responsible organization will change from JTA to JNTO from FY2015 in principle (Cabinet decision in December, 2013).
 - The 14th overseas office was opened in Jakarta (March, 2014).
http://www.jnto.go.jp/jpn/news/press_releases/pdf/pdf/20140319_jakarta_office.pdf

3. Development of environment for receiving foreigners

- Establishment of multilingual guidelines
 - Multilingual guidelines common to art museums / museums, natural parks, tourist areas, roads and public transportations, etc. were established from the perspective of foreigners (March, 2014).
https://www.mlit.go.jp/kankocho/news03_000102.html
- Revision of tax-free shopping system for foreign visitors, increase of tax-free shops in regions
 - Decision was made to expand the tax-free items to all the consumables including confectioneries and cosmetics. Scheduled to be implemented from October, 2014.
 - Logos for tax-free shop was created (January, 2014) and advising offices for tax-free shops were established (April, 2014). Contents of reform :
http://www.mlit.go.jp/kankocho/news02_000197.html Tax-free shop logos logo :
http://www.mlit.go.jp/kankocho/news03_000098.html
- Improvement of card-transaction environment for foreign visitors
 - JTA acquired three main banks in Japan to locate ATMs accepting international credit cards.

main banks decided to install them sequentially from FY2015.
https://www.mlit.go.jp/kankocho/news03_000095.html

- Smooth operation and time reduction in immigration procedures
 - An investigative commission for the installation of fast lanes (lanes giving priority to VIPs) is underway. Early installations in major airports are under consideration.

4 Promotion to invite MICE* (international conferences, etc.)

※ MICE represents Meetings, Incentives, Conventions / Conferences, Events.

- Development of Global MICE Cities
 - Selection of five cities as "Global MICE Strategic Cities" and two cities as "Global MICE Strengthening Cities" and provision of support in improvement of marketing capabilities of the cities by dispatching overseas advisors, etc. https://www.mlit.go.jp/kankocho/news07_000049.html
- Introduction of the MICE ambassador program
 - Appointment of eight influential persons, etc. of academic society as MICE ambassadors in order to invite international conferences. https://www.mlit.go.jp/kankocho/topics07_000031.html
- Promotion of developing and using unique venues
 - A guidebook (handbook) was created to promote the utilization and facilitation of museums, art museums as unique venues of conferences and receptions. https://www.mlit.go.jp/kankocho/news07_000075.html
- Invitation to Nara Tourism Statistics Week
 - 13th Global Forum on Tourism Statistics and UNWTO Tourism Statistics Special Workshop are invited. Both events will be held in Nara in November 17 to 21, 2014. <http://naratourismstatisticsweek.visitors.jp/>

5 Promotion to develop attractive tourism regions

- Recovery of Tohoku region by tourism
 - Support has been provided in the recovery of Tohoku region from great East Japan earthquake by information dissemination. <http://tohoku-monogatari.org/>
- Support menu related to the tourism region development including the list of tourism region development support measures by relevant ministries and offices.
<http://www.mlit.go.jp/kankocho/shisaku/kankochi/shienmenu.html>
- Link collection of the nationwide municipalities / Tourism Associations etc.
Links of websites of nationwide municipalities / Tourism Associations etc. (total 2,403) will be collected and posted on the JTA website as portal sites.
http://www.mlit.go.jp/kankocho/kanko_links.html
- Reconstruction / fortification project of attractive tourism areas in collaboration of public and private sectors
 - Support was provided for initiatives to commercialize regional materials and 78 tours were produced as travel products. https://www.mlit.go.jp/kankocho/news05_000146.html
 - Ten items representing Japanese food brand were selected from more than 700 souvenirs and an event (Ultimate Souvenir Forum) was implemented to advertise the selected items (November, 2013).

<http://tabicollege.jp/omiyage/>

- Omotenashi workshop was held

Experts are discussing the roles expected in Tourism Associations.

http://www.mlit.go.jp/kankocho/news04_000067.html

- Promotion of attractive tourism region development favored by domestic and overseas visitors

Promotion of tourism region will be done by both public and private sectors including cities, towns, and villages jointly. <http://www.mlit.go.jp/kankocho/shisaku/kankochi/seibi.html>

6 Fortification of tourism industry and travel promotion

- Creation of support tools for managing Ryokans

- Manuals were created for ryokan managers to perform accounting and managing.

https://www.mlit.go.jp/kankocho/news06_000203.html

- Human resource development project at local universities by the alliance between government, industry and academia

- Seminars were held for young managers / successors of hotels / ryokans for the fortification of regional accommodation industry. http://www.mlit.go.jp/kankocho/topics06_000041.html

- Travel industry workshop was held (a total of eight meetings)

- Future perspectives of the tourism industry and the direction of reviewing current regulations are summarized and published. http://www.mlit.go.jp/kankocho/page06_000076.html

- Propagation and promotion of universal tourism

- In order to develop environments where safety travel can be enjoyed by anybody including the elderly, regional systems for receiving were enhanced, and manuals were created for the generation and dissemination of travel products and published.

<https://www.mlit.go.jp/kankocho/shisaku/sangyou/manyuaru.html>