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Japan

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Japan

Tourism in the economy

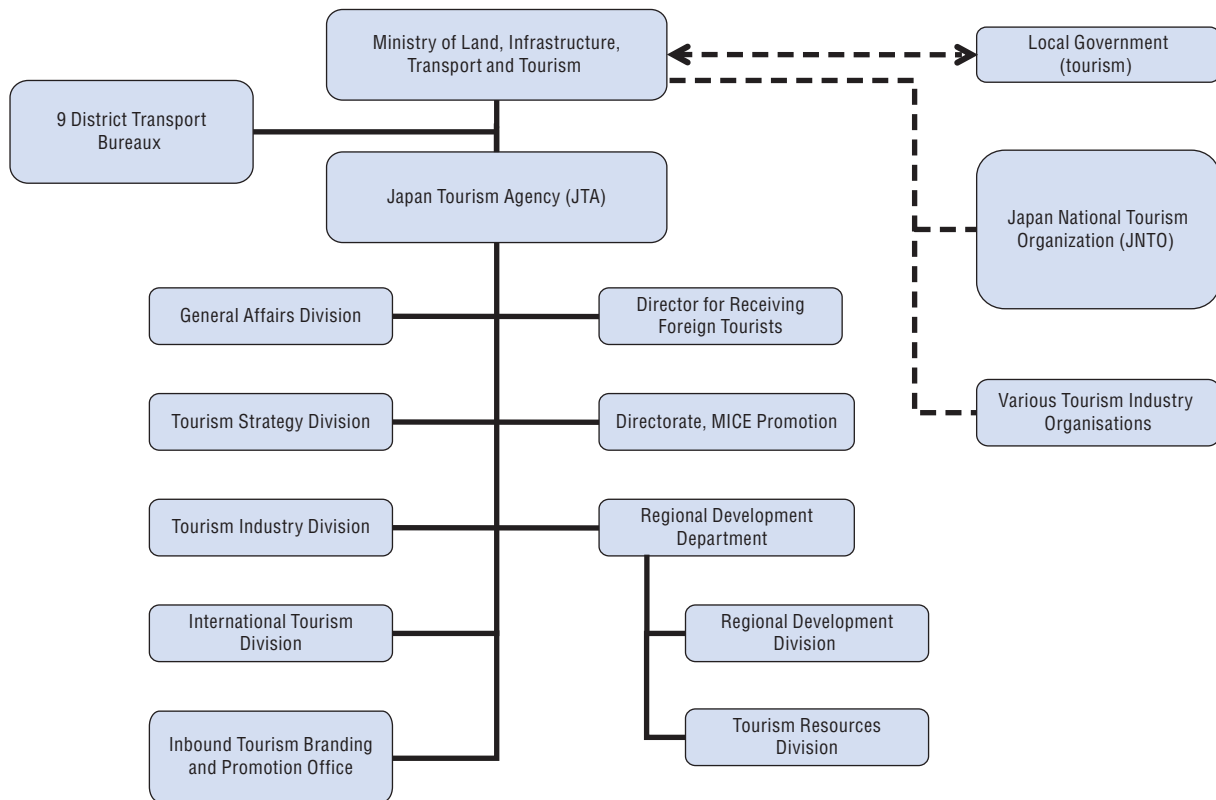
Tourism is one of the largest sectors in the Japanese economy. Internal tourism consumption in Japan in 2011 was estimated to be JPY 21.5 trillion (including about JPY 1 trillion from international visitors). The total travel consumption of the Japanese (which has declined in recent years) was estimated at JPY 24.6 trillion, of which approximately JPY 3.2 trillion was spent overseas.

The direct and indirect contribution of tourism to GDP in 2011 was JPY 46.4 trillion (5.0%), according to the Tourism Satellite Accounts. The 4 million jobs generated by the industry provided 6.2% of total employment in 2011. Tax revenues from the tourism industry were estimated to be JPY 4 trillion or 5.1% of total tax revenues (including national and local taxes) in 2011/12.

Tourism organisation and governance

The Japan Tourism Agency (JTA), established in October 2008 as an extra-ministerial bureau of the Ministry of Land, Infrastructure, Transport and Tourism, oversees the administration of the tourism policy (Figure 1). In co-operation with the public and private sectors, it promotes the attractiveness of Japan as a tourism destination. The agency, led by a Commissioner, represents the government of Japan in all matters concerning tourism.

In June 2013, the government set as a new target the objective to attract 20 million international visitors by 2030. The Tourism Strategy and International Tourism Divisions were formed to bring together policies necessary to achieve this goal. In addition, an Inbound Policy Promotion Office was created.

Figure 1. **Japan: Organisational chart of tourism bodies**

Source: OECD, adapted from the Japan Tourism Agency, 2014.

Tourism budgets

The Ministry of Land, Infrastructure, Transport and Tourism budget for tourism-related activities in 2013/14 (not including regional development and infrastructure building budgets) is approximately JPY 10.2 billion. This includes JPY 6.1 billion for the Visit Japan campaign and JPY 1.8 billion in subsidies for the Japan National Tourism Organization (JNTO). The remainder of JNTO's budget of JPY 2.8 billion in 2013/14 is made up of JPY 360 million in contributions, convention sponsorship and other income, JPY 200 million in business income, and JPY 380 million in donations.

Tourism-related policies and programmes

In June 2013, the government introduced the Japan Revitalization Strategy ("Japan is Back"), a new growth strategy aimed at reviving the Japanese economy. One of the specific elements within the strategy is the Strategic Market Creation Plan, which aims to attract people from around the world (20 million international visitors by 2030).

In July 2010 the government put into force measures to simplify the procedures for tourist visas for Chinese nationals, including easing visa requirements and increasing access to diplomatic establishments and tourism agencies to apply for visas. It has also taken other measures, including promotional campaigns under the "selection and concentration" principle, promoting tourism in collaboration with medical and other growth fields, and improving the welcoming environment for international travellers (e.g. authorising paid tour guides in addition to nationally licensed tour guide-interpreters). By these measures, Japan aims to increase the number of international visitors to Japan, towards the target of 30 million.

The government created the Tourism-based Country Promotion Basic Plan in 2007, which aims to develop Japan as a tourism-oriented country. In March 2012, a new basic plan was developed to address such issues as the recovery after the Great East Japan Earthquake of March 2011, and to accelerate Japan's economic growth over the next five years. The policy direction of the basic plan includes "expanding tourism's support base" and "improving the quality of tourism".

In order to speed up the recovery in visitor numbers to Japan, the JTA is developing an "All Japan" system of promoting inbound travel, using all the human resources and opportunities available, including the private sector, diplomatic missions abroad, and the opportunities provided by open-skies agreements and MICE events held in Japan and abroad. The agency is also more generally encouraging business demand for international conferences and the whole range of MICE events, both domestic and international. The agency has also held a Tourism Industry Policy Review Forum, at which industry experts compiled a list of priority policy proposals and issues to be addressed.

In cultivating the human resources necessary to support growth, tourism authorities are advancing initiatives to train future business managers through collaboration with industry, academia and government. They are also working to improve education related to tourism within institutions of higher education and further education programmes.

A specific example is the "Conference of university presidents and deans on tourism education", which was held in July 2013 to discuss the role of university education. Another example is the implementation of internship model programmes, created with the co-operation of tourism industry organisations and companies to promote knowledge about the tourism industry and generate interest in working in the industry.

Statistics and performance evaluation

The Japan Tourism Agency is implementing a new standard to collect inbound tourism statistics at the prefecture level, including data on visitors, tourism consumption and tourism receipts. In 2010/11, the Overnight Travel Statistics Survey was expanded to include small-scale accommodation facilities. In 2011/12, a "Consumption Trend Survey for International Visitors to Japan" was introduced in order to understand better the consumption patterns of international visitors and to gain information on their opinions and attitudes. In addition to establishing Tourism Satellite Accounts, a Regional Tourism Economic Survey was implemented, which will help to clarify the economic effects of tourism on local areas, the position of the tourism industry in these areas, and the flow of tourism-related money in these areas.

Statistical profile

Table 1. Japan: Domestic tourism

	Unit	2008	2009	2010	2011	2012
Total domestic trips		..	..	..	..	..
Overnight visitors (tourists)		..	..	..	..	..
Same-day visitors (excursionists)		..	..	..	..	..
<i>Trips by main purpose of visit</i>						
Business and professional		..	..	..	..	..
Holiday, leisure and recreation		..	..	..	..	..
Nights in all means of accommodation ¹	Thousand	309 699	301 304	348 823	339 339	359 945
Hotels and similar establishments		..	..	..	..	..
Other collective establishments		..	..	..	..	..
Domestic travel receipts	Billion JPY	18 900	17 300	16 000	15 100	..

1. Accommodation with more than ten employees.

Source: Japan Tourism Agency.


StatLink  <http://dx.doi.org/10.1787/888932987822>

Table 2. Japan: Inbound tourism

	Unit	2008	2009	2010	2011	2012
Total international arrivals	Thousand	8 351	6 790	8 611	6 219	8 368
Overnight visitors (tourists)		..	..	..	..	..
Same-day visitors (excursionists)		..	..	..	..	..
<i>Top markets</i>						
Korea	Thousand	2 382	1 587	2 440	1 658	2 044
Chinese Taipei	Thousand	1 390	1 024	1 268	994	1 467
China	Thousand	1 000	1 006	1 413	1 043	1 430
United States	Thousand	768	700	727	566	717
Hong Kong, China	Thousand	550	450	509	365	482
Nights in all means of accommodation		..	..	..	..	..
Hotels and similar establishments		..	..	..	..	..
Other collective establishments		..	..	..	..	..
Total international receipts	Billion JPY	1 430	1 170	1 350	1 000	1 300
International travel receipts	Billion JPY	1 120	960	1 160	900	1 200
International passenger transport receipts	Billion JPY	310	210	190	100	100

Source: Japan National Tourism Organization, Bank of Japan.


StatLink  <http://dx.doi.org/10.1787/888932987841>

Table 3. Japan: Outbound tourism

	Unit	2008	2009	2010	2011	2012
Total international departures		..	..	..	..	..
Overnight visitors (tourists)	Thousand	15 987	15 446	16 637	16 994	18 490
Same-day visitors (excursionists)		..	..	..	..	..
Total international expenditure	Billion JPY	4 030	3 250	3 480	3 170	3 280
International travel expenditure	Billion JPY	2 880	2 350	2 490	2 170	2 240
International passenger transport expenditure	Billion JPY	1 150	900	990	1 000	1 040

Source: Ministry of Justice, Bank of Japan.


StatLink  <http://dx.doi.org/10.1787/888932987860>

Table 4. Japan: Enterprises in tourism
Number of establishments

	2008	2009	2010	2011	2012
Total tourism enterprises	71 055	69 090	66 818	66 299	..
Tourism industries
Accommodation services for visitors
Hotels and similar establishments ¹	60 449	58 654	56 535	56 059	..
Food and beverage serving industry
Passenger transport
Air passenger transport
Railways passenger transport
Road passenger transport
Water passenger transport
Passenger transport supporting services
Transport equipment rental
Travel agencies and other reservation services industry ²	10 606	10 436	10 283	10 240	10 146
Cultural industry
Sports and recreation industry
Retail trade of country-specific tourism characteristic goods
Other country-specific tourism industries
Other industries

1. Includes Western and Japanese style hotels.

2. Travel agencies.

Source: Ministry of Land, Infrastructure and Transport.

StatLink  <http://dx.doi.org/10.1787/888932987879>

Table 5. Japan: Internal tourism consumption
Billion JPY, 2011

	Domestic tourism consumption	Inbound tourism consumption	Internal tourism consumption
Total	20 505	998	21 503
Consumption products	..	..	..
Tourism characteristic products	..	..	..
Accommodation services for visitors	3 176	302	3 478
Food and beverage serving services	2 237	185	2 422
Passenger transport services	6 424	218	6 642
Air passenger transport services	..	..	..
Railways passenger transport services	..	..	..
Road passenger transport services	..	..	..
Water passenger transport services	..	..	..
Passenger transport supporting services	..	..	..
Transport equipment rental services	..	..	..
Travel agencies and other reservation services	410	6	416
Cultural services	279	7	286
Sports and recreation services ¹	429	4	433
Country-specific tourism characteristic goods	..	..	..
Country-specific tourism characteristic services	..	..	..
Other consumption products ²	7 550	275	7 825
Tourism connected products	..	..	..
Non-tourism related consumption products	..	..	..
Non-consumption products	..	..	..

1. Includes recreation and other entertainment services.

2. Tourism connected goods and other services.

Source: Japan Tourism Agency, Tourism Satellite Account.


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Table 6. **Japan: Key economic indicators**

Percentage

	2008	2009	2010	2011	2012
Tourism GDP (direct) as % of total GDP	2.7	2.6 |	2.4	2.3	..
Total tourism employment (direct) as % of total employment	4.2	4.0 |	3.6	3.3	..

Source: Japan Tourism Agency, Japan System of National Accounts, Balance of Payments.

StatLink  <http://dx.doi.org/10.1787/888932987936>

For more information

Japan Tourism Agency
Japan National Tourism Organization

www.mlit.go.jp/kankocho
www.jnto.go.jp