

## 2014 Survey of Travelers to Japan from Eight Asian Regions

REGIONAL STRATEGIES INCLUDE SKILLFUL MARKETING, BRANDING OF TOURIST AREAS

PRODUCTS SHOWCASING JAPAN'S CUISINE AND OTHER TRADITIONS PROMOTE BUSINESS DEVELOPMENT AND TIE-UPS OVERSEAS

1. Japan is seeing a huge increase in tourists from overseas. According to the Japan National Tourist Organization, a total of 10,360,000 tourists visited Japan in 2013. This was a 24-percent rise over the previous year and the first time the number surpassed 10 million. Eighty percent of these were visitors from Asia, with Taiwan and Korea leading the way with more than two million visitors per year. Since the Japanese government relaxed its visa requirements for travelers from Asia in July 2013, the number of visitors from Thailand, Malaysia, Indonesia and elsewhere in Southeast Asia has risen markedly. Nonetheless, when viewed in terms of the number of foreign visitors per capita, Japan's ratio of 8.1 percent is a mere one-third of that of Korea<sup>1</sup>, to say nothing of the figures for France (131.3 percent) and Italy (78.8 percent). Clearly, Japan still has some way to go.
2. Since 2012, DBJ has carried out an annual *Survey of Travelers to Japan from Eight Asian Regions*. This year's survey was conducted in September in the form of an online questionnaire. As in previous years, the respondents were residents of eight regions in Asia<sup>2</sup> with experience of international travel.
3. The 2014 survey found Japan to be the most popular tourist destination among the whole eight-region group – even more popular this year than in the previous two. Some 70 percent of respondents from Taiwan and Hong Kong expressed the desire to visit Japan, as did some 60 percent of those from Malaysia, Thailand, and Singapore. Indonesian respondents wishing to travel to Japan increased by six percentage points over last year, suggesting that the easing of visa requirements is having an effect (p. 2, 3).
4. Continuing a trend observed in the previous two surveys, the current poll revealed that the areas enjoying greatest recognition were the “Golden Route,” stretching from Tokyo to Osaka, and Hokkaido. This was also where they most wanted to go (p. 17-19). Mt. Fuji showed conspicuous annual growth in the number of actual visits, at least partly as a result of its designation as a World Heritage Site in June of last year (p. 7).
5. Respondents who had been to Japan reported staying at traditional inns (ryokan), luxury hotels, and inexpensive hotels in approximately equal percentages. However, when asked where they would like to stay on a future trip to Japan, an overwhelming percentage of respondents from all regions said they hoped to stay at a traditional inn. The survey found that more respondents would be interested in bathing in hot springs or communal baths if they were able to wear bathing suits or other covering, pointing to latent demand for traditional inns, hot springs resorts, and communal bathing facilities (p. 6, 22).
6. Questions about dining drew diverse responses. In addition to such traditional Japanese foods as sushi and sashimi, respondents showed interest in ramen, udon, and other noodle dishes, as well as sake, seafood, fruit and a wide variety of other products of Japan's farms and fisheries. Growing interest in traveling to Japan, and the national qualities represented by Japanese food, can translate into overseas business development for products such as sake, Japanese sweets, porcelain and ceramics, and stationery by providing them with added value (p.28).
7. Most respondents showed little interest in the upcoming Olympics, with the exception of those from China. Asked if they knew the location of the 2020 Olympics, over half replied that they did not know or did not care. This result suggests that greater publicity efforts are needed to spur interest in the Tokyo Olympics (p.26).
8. The easing of visa requirements implemented in July 2013 was well known in each of the regions surveyed. Moreover, extremely high percentages said they knew of the measures and had visited Japan, or knew of the measures and wanted to visit. Interest was particularly strong among those who had not yet traveled to Japan. The measures have clearly been effective in encouraging inbound tourism (p.27).
9. The greatest concerns among visitors were communication, cost, radioactivity, and earthquakes (p.24). People throughout East Asia remain highly concerned about issues deriving from the 2011 earthquake and tsunami. These worries have eased somewhat, however, since the previous survey. The provision of broad-ranging, accurate information continues to be of utmost importance (p.25).
10. Dissatisfaction with language, cost, and communication – the “travel environment” – was conspicuous in the answers to this survey. Respondents reported significant unhappiness with content, which differed according to nationality. Chinese respondents voiced dissatisfaction with shopping; those from Southeast Asia with gambling and nightlife (p.13, 14). Future inbound tourism initiatives will need careful marketing and must take into account the nationalities of those to whom they are aimed. A Destination Management Organization (DMO) should be created to manage the work of the entities involved. A more strategic approach, involving region-wide efforts to promote the branding of each area's tourism resources, will go far to enhance future initiatives.

<sup>1</sup> Calculated by DBJ based on the UN, *World Population Prospects: The 2012 Revision* and Japan National Tourist Organization materials.

<sup>2</sup> The survey was aimed at nationals of eight regions: Korea, China, Taiwan, Hong Kong, Thailand, Singapore, Malaysia, and Indonesia.

| Contents   | This year's survey | Last year's survey (reference) <sup>1</sup> |
|--|--------------------|---|
| ◆ Survey outline and respondent attributes   | p. 1               | (p.1)                                       |
| ◆ Travel preferences by country/region: "Where would you like to go on a foreign holiday?"   | p.2                | (p.2)                                       |
| ◆ Travel preferences compared with previous year: "Where would you like to go on a foreign holiday?" (Interested respondents; comparison to previous year) | p.3                | (p.3)                                       |
| ◆ General thoughts on foreign travel: "What do you wish for in a foreign holiday?"   | p.4                | (p.4)                                       |
| ◆ Your most recent trip to Japan: Purpose, companions and mode of travel   | p.5                | (p.6-7)                                     |
| ◆ "How did you arrange for hotel/inn accommodations on your last trip to Japan?"   | p.6                | (p.7) <sup>*2</sup>                         |
| ◆ "Which areas of Japan have you visited up to now?"   | p.7                | (p.8)                                       |
| ◆ When planning your trip to Japan, did you consider other countries or regions?"  | p.8                | (p.9)                                       |
| ◆ "Why did You choose Japan as your destination?"  | p.9                | (p.10)                                      |
| ◆ "What were your sources of information on Japan?"  | p.10               | (p.11)                                      |
| ◆ "Which aspects of your trip did you decide after arrival? Which did you perceive as expensive?"  | p.11               | (p.12)                                      |
| ◆ Shopping in Japan  | p.12               | (p.13)                                      |
| ◆ "Which parts of your trip to Japan satisfied you the most? The least?"   | p.13-14            | (p.14-15) <sup>*3</sup>                     |
| ◆ Images of Japanese tourist areas: "What would you like to see and do?"   | p.15-16            | (p.16-17)                                   |
| ◆ Japanese tourist areas: Traveler recognition and desire to visit   | p.17               | (p.18)                                      |
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| ◆ Desire to visit a Japanese tourist area, by number of past visits to Japan: "Where in Japan would you like to go"  | p.19               | (p.20)                                      |
| ◆ "What makes you want to visit Japan in future?"  | p.20               | (p.21)                                      |
| ◆ "How would you like to travel on a future trip to Japan?"  | p.21               | (p.22)                                      |
| ◆ Lodgings on a future trip to Japan, and bathing in hot springs   | p.22               | (p.23) <sup>*2</sup>                        |
| ◆ "What would you like to experience on a future trip to Japan?"   | p.23               | (p.24)                                      |
| ◆ Concerns: "What concerns do you have about a future trip to Japan?"  | p.24               | (p.25)                                      |
| ◆ Concerns: "Did the March 2011 earthquake change your mind about traveling to Japan?"   | p.25               | (p.26)                                      |
| ◆ "Do you know which country and city will host upcoming Olympic Games?"   | p.26               | ( - )                                       |
| ◆ "Are you aware of the measures implemented in July 2013 to make it easier to obtain a Japanese visa or visa exemption?"                                  | p.27               | ( - )                                       |
| ◆ Free response: "What would you like to eat and drink in Japan?"  | p.28               | ( - )                                       |

1 This questions and choices in this survey may differ from those in the previous survey. Some parts have been added or changed.

2 This survey had two new questions, regarding the type of lodgings used (p. 6) and the type of lodgings desired for a future trip (p. 22).

3. The previous survey had respondents rate each item on scale of 1 to 5. For this survey, they were asked to choose up to 5 items with which they were most (or least) satisfied.

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## 1. Survey Outline and Respondents

- Survey method: Online questionnaire
- Period conducted: September 9 – 16, 2014.
- Regions covered: Korea, China, Taiwan, Hong Kong, Thailand, Singapore, Malaysia, Indonesia (eight regions).
  - \* For China, the survey covered only the cities of Beijing and Shanghai.
- Target respondents: Men and women aged 20 to 59, with experience in foreign travel.
  - \* “Foreign travel” excludes travel between China, Hong Kong and Macao; Malaysia and Singapore; and Thailand and Malaysia.
- Valid responses: 500 people from each of the above regions, for a total of 4,000 people.
  - \* For China, 250 people each from Beijing and Shanghai.
- Survey conducted in cooperation with AIP Corporation.

### ◆Valid responses

| Item   | All   | Korea | China | Taiwan | Hong Kong | Thailand | Singapore | Malaysia | Indonesia |
|--------|-------|-------|-------|--------|-----------|----------|-----------|----------|-----------|
| Male   | 2,002 | 251   | 234   | 275    | 229       | 256      | 251       | 248      | 258       |
| Female | 1,998 | 249   | 266   | 225    | 271       | 244      | 249       | 252      | 242       |
| Total  | 4,000 | 500   | 500   | 500    | 500       | 500      | 500       | 500      | 500       |

### ◆Visits to Japan

| Item                    | All   | Korea | China | Taiwan | Hong Kong | Thailand | Singapore | Malaysia | Indonesia |
|-------------------------|-------|-------|-------|--------|-----------|----------|-----------|----------|-----------|
| Never visited           | 2,133 | 223   | 220   | 156    | 142       | 275      | 318       | 393      | 406       |
| Visited once            | 851   | 112   | 170   | 114    | 105       | 125      | 96        | 70       | 59        |
| Visited 2 or more times | 1,016 | 165   | 110   | 230    | 253       | 100      | 86        | 37       | 35        |
| Total                   | 4,000 | 500   | 500   | 500    | 500       | 500      | 500       | 500      | 500       |

Note: For the questions on the following pages, choices were given to each respondent in random order: p. 4, p. 12 (“Shopping in Japan”), p. 15, p. 16, p.23.

For the questions on the following pages, the first choice given was different for each respondent: p. 6 (Types of lodgings), p. 7, p. 9–11, p. 13, p. 14, p. 17–20, p. 22 (“Thoughts about lodgings and hot springs bathing on a future trip to Japan”), p. 23, p. 24.

**All respondents**

2. "Where would you like to go on a foreign holiday?"

◆ **Japan was a choice of a majority of respondents in all eight Asian regions.**

- Japan topped the list of places respondents wanted to visit, drawing the highest percentages from all regions except Korea. Ratios of those thinking seriously about a Japan vacation were similarly high.
- Some 70 percent of respondents from Taiwan and Hong Kong expressed a desire to visit Japan, as did some 60 percent of those from Malaysia, Thailand and Singapore.
- The percentage of Korean respondents wishing to visit Japan was relatively small, despite its having among the largest numbers of travelers to Japan. Among those Koreans thinking seriously of a foreign vacation, however, Japan was the top prospective destination.

(Multiple responses)

| Respondents→<br>Sample size            | All           |                          | Korea         |                          | China         |                          | Taiwan        |                          | Hong Kong     |                          | Thailand      |                          | Singapore     |                          | Malaysia      |                          | Indonesia     |                          |
|--|---------------|--------------------------|---------------|--------------------------|---------------|--------------------------|---------------|--------------------------|---------------|--------------------------|---------------|--------------------------|---------------|--------------------------|---------------|--------------------------|---------------|--------------------------|
|  | 4000          |                          | 500           |                          | 500           |                          | 500           |                          | 500           |                          | 500           |                          | 500           |                          | 500           |                          | 500           |                          |
| Countries/regions<br>hoping to visit ↓ | Hope to visit | Specifically considering | Hope to visit | Specifically considering | Hope to visit | Specifically considering | Hope to visit | Specifically considering | Hope to visit | Specifically considering | Hope to visit | Specifically considering | Hope to visit | Specifically considering | Hope to visit | Specifically considering | Hope to visit | Specifically considering |
| Japan                                  | 55%           | 35%                      | 26%           | 15%                      | 55%           | 39%                      | 71%           | 35%                      | 66%           | 50%                      | 57%           | 46%                      | 57%           | 37%                      | 59%           | 33%                      | 48%           | 24%                      |
| Korea                                  | 43%           | 25%                      | -             | -                        | 52%           | 31%                      | 30%           | 8%                       | 52%           | 35%                      | 33%           | 20%                      | 47%           | 30%                      | 48%           | 32%                      | 37%           | 16%                      |
| Australia                              | 42%           | 17%                      | 43%           | 14%                      | 54%           | 24%                      | 35%           | 2%                       | 49%           | 27%                      | 20%           | 7%                       | 46%           | 25%                      | 56%           | 25%                      | 32%           | 11%                      |
| New Zealand                            | 39%           | 13%                      | 38%           | 9%                       | 49%           | 17%                      | 40%           | 2%                       | 40%           | 19%                      | 23%           | 7%                       | 49%           | 21%                      | 50%           | 20%                      | 23%           | 9%                       |
| Switzerland                            | 38%           | 11%                      | 46%           | 11%                      | 40%           | 9%                       | 38%           | 2%                       | 39%           | 18%                      | 27%           | 12%                      | 45%           | 18%                      | 46%           | 17%                      | 23%           | 3%                       |
| France                                 | 37%           | 12%                      | 43%           | 13%                      | 46%           | 14%                      | 36%           | 4%                       | 41%           | 20%                      | 20%           | 6%                       | 38%           | 14%                      | 41%           | 17%                      | 29%           | 9%                       |
| USA                                    | 37%           | 13%                      | 32%           | 9%                       | 50%           | 20%                      | 41%           | 7%                       | 33%           | 15%                      | 19%           | 8%                       | 50%           | 22%                      | 38%           | 16%                      | 29%           | 8%                       |
| United Kingdom                         | 35%           | 12%                      | 33%           | 6%                       | 41%           | 12%                      | 33%           | 2%                       | 41%           | 22%                      | 23%           | 8%                       | 38%           | 17%                      | 39%           | 18%                      | 29%           | 7%                       |
| Italy                                  | 33%           | 10%                      | 36%           | 10%                      | 38%           | 12%                      | 35%           | 2%                       | 37%           | 17%                      | 15%           | 5%                       | 36%           | 14%                      | 42%           | 14%                      | 27%           | 7%                       |
| Hong Kong                              | 32%           | 14%                      | 28%           | 8%                       | 52%           | 29%                      | 34%           | 9%                       | -             | -                        | 19%           | 8%                       | 33%           | 16%                      | 32%           | 18%                      | 25%           | 12%                      |
| Taiwan                                 | 31%           | 17%                      | 16%           | 4%                       | 44%           | 23%                      | -             | -                        | 52%           | 36%                      | 12%           | 4%                       | 40%           | 25%                      | 41%           | 26%                      | 11%           | 2%                       |
| Germany                                | 30%           | 9%                       | 32%           | 7%                       | 39%           | 12%                      | 32%           | 3%                       | 36%           | 18%                      | 13%           | 4%                       | 35%           | 11%                      | 34%           | 11%                      | 21%           | 6%                       |
| Hawaii                                 | 29%           | 8%                       | 41%           | 10%                      | 46%           | 15%                      | 32%           | 2%                       | 27%           | 13%                      | 10%           | 3%                       | 31%           | 8%                       | 31%           | 11%                      | 16%           | 3%                       |
| Canada                                 | 29%           | 8%                       | 34%           | 8%                       | 39%           | 12%                      | 36%           | 2%                       | 28%           | 13%                      | 11%           | 3%                       | 40%           | 11%                      | 29%           | 8%                       | 18%           | 4%                       |
| Spain                                  | 29%           | 9%                       | 39%           | 13%                      | 31%           | 9%                       | 30%           | 2%                       | 34%           | 17%                      | 10%           | 1%                       | 33%           | 12%                      | 34%           | 11%                      | 19%           | 4%                       |
| Singapore                              | 27%           | 12%                      | 20%           | 6%                       | 35%           | 16%                      | 31%           | 4%                       | 37%           | 21%                      | 26%           | 14%                      | -             | -                        | 21%           | 12%                      | 17%           | 10%                      |
| Mainland China                         | 25%           | 12%                      | 18%           | 8%                       | -             | -                        | 37%           | 12%                      | 34%           | 21%                      | 22%           | 12%                      | 21%           | 10%                      | 30%           | 16%                      | 14%           | 5%                       |
| Thailand                               | 25%           | 11%                      | 15%           | 5%                       | 31%           | 11%                      | 23%           | 3%                       | 34%           | 19%                      | -             | -                        | 26%           | 13%                      | 26%           | 13%                      | 19%           | 10%                      |
| Austria                                | 23%           | 5%                       | 28%           | 4%                       | 29%           | 7%                       | 28%           | 1%                       | 25%           | 11%                      | 12%           | 3%                       | 22%           | 7%                       | 23%           | 8%                       | 14%           | 1%                       |
| Macao                                  | 22%           | 8%                       | 15%           | 3%                       | 38%           | 16%                      | 28%           | 4%                       | 33%           | 17%                      | 8%            | 2%                       | 19%           | 6%                       | 24%           | 12%                      | 9%            | 2%                       |
| Other Europe                           | 22%           | 6%                       | 22%           | 7%                       | 21%           | 3%                       | 24%           | 2%                       | 23%           | 11%                      | 14%           | 4%                       | 26%           | 7%                       | 25%           | 8%                       | 17%           | 4%                       |
| Malaysia                               | 17%           | 6%                       | 7%            | 1%                       | 21%           | 7%                       | 20%           | 1%                       | 27%           | 13%                      | 10%           | 4%                       | 19%           | 9%                       | -             | -                        | 12%           | 7%                       |
| Vietnam                                | 15%           | 5%                       | 15%           | 5%                       | 11%           | 1%                       | 13%           | 1%                       | 17%           | 8%                       | 16%           | 9%                       | 20%           | 8%                       | 22%           | 8%                       | 8%            | 2%                       |
| Guam                                   | 14%           | 3%                       | 22%           | 7%                       | 17%           | 3%                       | 28%           | 1%                       | 26%           | 10%                      | 1%            | 0%                       | 8%            | 2%                       | 10%           | 2%                       | 2%            | 0%                       |
| Mideast (Dubai, etc.)                  | 13%           | 4%                       | 8%            | 1%                       | 15%           | 3%                       | 12%           | 1%                       | 15%           | 8%                       | 4%            | 1%                       | 15%           | 5%                       | 17%           | 8%                       | 15%           | 6%                       |
| Indonesia                              | 12%           | 3%                       | 9%            | 2%                       | 16%           | 3%                       | 14%           | 1%                       | 11%           | 3%                       | 5%            | 2%                       | 13%           | 4%                       | 18%           | 7%                       | -             | -                        |
| Central & South America                | 12%           | 3%                       | 16%           | 3%                       | 13%           | 1%                       | 11%           | 1%                       | 15%           | 6%                       | 3%            | 0%                       | 17%           | 4%                       | 14%           | 4%                       | 6%            | 1%                       |
| Philippines                            | 10%           | 3%                       | 13%           | 4%                       | 10%           | 1%                       | 11%           | 0%                       | 6%            | 3%                       | 3%            | 1%                       | 14%           | 6%                       | 17%           | 7%                       | 7%            | 1%                       |
| India                                  | 9%            | 2%                       | 11%           | 2%                       | 13%           | 3%                       | 8%            | 0%                       | 10%           | 3%                       | 6%            | 3%                       | 8%            | 3%                       | 11%           | 4%                       | 7%            | 1%                       |
| Africa                                 | 7%            | 2%                       | 6%            | 1%                       | 12%           | 1%                       | 5%            | 0%                       | 9%            | 5%                       | 3%            | 0%                       | 11%           | 4%                       | 6%            | 2%                       | 4%            | 0%                       |
| Other areas                            | 2%            | 1%                       | 1%            | 0%                       | 0%            | 0%                       | 2%            | 1%                       | 0%            | 0%                       | 4%            | 2%                       | 2%            | 1%                       | 1%            | 1%                       | 4%            | 3%                       |
| Not interested in foreign travel       | 1%            |                          | 1%            |                          | 0%            |                          | 1%            |                          | 0%            |                          | 3%            |                          | 1%            |                          | 0%            |                          | 1%            |                          |

Note: The top 5 items are highlighted in red or yellow. When a respondent's home country or region is the same as the place they want to visit, that country or region is removed from the sample size.

3. **All respondents** Travel preferences compared with previous year: “Where would you like to go on a foreign holiday?” (Respondents wishing to travel; year-on-year comparison)

◆ **Japan has gained in popularity since last year’s survey**

- For the second year in a row, there was an increase in the percentage of respondents from all eight Asian regions who said they wanted to visit Japan (2012: 47% → 2013: 52% → 2014: 55%).
- The percentage of Indonesians who hoped to visit Japan increased by six percentage points since last year’s survey, suggesting that last July’s easing of visa requirements is having an effect (2012: 41% → 2013: 42% → 2014: 48%).
- China’s renewed interest in Japan travel can be seen in the 10-percent increase over the 2012 survey in the percentage of Chinese respondents indicating their desire to visit (2012: 45% → 2013: 53% → 2014: 55%).

(Multiple responses)

| Respondents→<br>Number of samples<br>Countries/regions<br>hoping to visit ↓ | All           |               | Korea         |               | China         |               | Taiwan        |               | Hong Kong     |               | Thailand      |               | Singapore     |               | Malaysia      |               | Indonesia     |               |
|---|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|
|   | 4000          | 4000          | 500           | 500           | 500           | 500           | 500           | 500           | 500           | 500           | 500           | 500           | 500           | 500           | 500           | 500           | 500           | 500           |
|   | 2013          | 2014          | 2013          | 2014          | 2013          | 2014          | 2013          | 2014          | 2013          | 2014          | 2013          | 2014          | 2013          | 2014          | 2013          | 2014          | 2013          | 2014          |
|   | Hope to visit | Hope to visit | Hope to visit | Hope to visit | Hope to visit | Hope to visit | Hope to visit | Hope to visit | Hope to visit | Hope to visit | Hope to visit | Hope to visit | Hope to visit | Hope to visit | Hope to visit | Hope to visit | Hope to visit | Hope to visit |
| Japan   | 52%           | 55%           | 20%           | 26%           | 53%           | 55%           | 68%           | 71%           | 62%           | 66%           | 55%           | 57%           | 57%           | 57%           | 56%           | 59%           | 42%           | 48%           |
| Korea   | 41%           | 43%           | -             | -             | 46%           | 52%           | 30%           | 30%           | 50%           | 52%           | 27%           | 33%           | 47%           | 47%           | 51%           | 48%           | 32%           | 37%           |
| Australia   | 42%           | 42%           | 46%           | 43%           | 54%           | 54%           | 32%           | 35%           | 51%           | 49%           | 20%           | 20%           | 46%           | 46%           | 52%           | 56%           | 33%           | 32%           |
| New Zealand   | 37%           | 39%           | 44%           | 38%           | 44%           | 49%           | 38%           | 40%           | 36%           | 40%           | 18%           | 23%           | 52%           | 49%           | 43%           | 50%           | 17%           | 23%           |
| Switzerland   | 37%           | 38%           | 49%           | 46%           | 42%           | 40%           | 37%           | 38%           | 37%           | 39%           | 20%           | 27%           | 47%           | 45%           | 39%           | 46%           | 23%           | 23%           |
| France  | 36%           | 37%           | 45%           | 43%           | 45%           | 46%           | 39%           | 36%           | 39%           | 41%           | 16%           | 20%           | 37%           | 38%           | 38%           | 41%           | 31%           | 29%           |
| USA   | 37%           | 37%           | 33%           | 32%           | 51%           | 50%           | 41%           | 41%           | 30%           | 33%           | 19%           | 19%           | 49%           | 50%           | 36%           | 38%           | 33%           | 29%           |
| United Kingdom  | 35%           | 35%           | 38%           | 33%           | 39%           | 41%           | 35%           | 33%           | 39%           | 41%           | 19%           | 23%           | 40%           | 38%           | 38%           | 39%           | 35%           | 29%           |
| Italy   | 32%           | 33%           | 36%           | 36%           | 39%           | 38%           | 35%           | 35%           | 36%           | 37%           | 15%           | 15%           | 34%           | 36%           | 33%           | 42%           | 27%           | 27%           |
| Hong Kong   | 33%           | 32%           | 28%           | 28%           | 51%           | 52%           | 35%           | 34%           | -             | -             | 23%           | 19%           | 33%           | 33%           | 37%           | 32%           | 24%           | 25%           |
| Taiwan  | 31%           | 31%           | 16%           | 16%           | 44%           | 44%           | -             | -             | 55%           | 52%           | 8%            | 12%           | 40%           | 40%           | 41%           | 41%           | 10%           | 11%           |
| Germany   | 29%           | 30%           | 35%           | 32%           | 37%           | 39%           | 35%           | 32%           | 34%           | 36%           | 10%           | 13%           | 31%           | 35%           | 27%           | 34%           | 23%           | 21%           |
| Hawaii  | 30%           | 29%           | 45%           | 41%           | 44%           | 46%           | 35%           | 32%           | 30%           | 27%           | 8%            | 10%           | 30%           | 31%           | 30%           | 31%           | 15%           | 16%           |
| Canada  | 28%           | 29%           | 36%           | 34%           | 39%           | 39%           | 34%           | 36%           | 28%           | 28%           | 10%           | 11%           | 35%           | 40%           | 28%           | 29%           | 16%           | 18%           |
| Spain   | 26%           | 29%           | 36%           | 39%           | 33%           | 31%           | 27%           | 30%           | 33%           | 34%           | 8%            | 10%           | 31%           | 33%           | 26%           | 34%           | 16%           | 19%           |
| Singapore   | 28%           | 27%           | 24%           | 20%           | 36%           | 35%           | 30%           | 31%           | 39%           | 37%           | 21%           | 26%           | -             | -             | 26%           | 21%           | 21%           | 17%           |
| Mainland China  | 26%           | 25%           | 16%           | 18%           | -             | -             | 38%           | 37%           | 32%           | 34%           | 21%           | 22%           | 26%           | 21%           | 30%           | 30%           | 16%           | 14%           |
| Thailand  | 26%           | 25%           | 16%           | 15%           | 30%           | 31%           | 25%           | 23%           | 37%           | 34%           | -             | -             | 29%           | 26%           | 25%           | 26%           | 20%           | 19%           |
| Austria   | 22%           | 23%           | 29%           | 28%           | 28%           | 29%           | 27%           | 28%           | 24%           | 25%           | 10%           | 12%           | 24%           | 22%           | 21%           | 23%           | 11%           | 14%           |
| Macao   | 22%           | 22%           | 14%           | 15%           | 38%           | 38%           | 22%           | 28%           | 36%           | 33%           | 9%            | 8%            | 22%           | 19%           | 29%           | 24%           | 9%            | 9%            |
| Other Europe  | 21%           | 22%           | 26%           | 22%           | 17%           | 21%           | 23%           | 24%           | 24%           | 23%           | 10%           | 14%           | 27%           | 26%           | 22%           | 25%           | 16%           | 17%           |
| Malaysia  | 18%           | 17%           | 11%           | 7%            | 26%           | 21%           | 19%           | 20%           | 30%           | 27%           | 9%            | 10%           | 20%           | 19%           | -             | -             | 9%            | 12%           |
| Vietnam   | 17%           | 15%           | 17%           | 15%           | 11%           | 11%           | 12%           | 13%           | 23%           | 17%           | 14%           | 16%           | 23%           | 20%           | 25%           | 22%           | 10%           | 8%            |
| Guam  | 14%           | 14%           | 30%           | 22%           | 15%           | 17%           | 27%           | 28%           | 24%           | 26%           | 2%            | 1%            | 8%            | 8%            | 8%            | 10%           | 2%            | 2%            |
| Mideast (Dubai, etc.)   | 13%           | 13%           | 9%            | 8%            | 14%           | 15%           | 14%           | 12%           | 17%           | 15%           | 4%            | 4%            | 16%           | 15%           | 17%           | 17%           | 15%           | 15%           |
| Indonesia   | 12%           | 12%           | 12%           | 9%            | 16%           | 16%           | 10%           | 14%           | 14%           | 11%           | 6%            | 5%            | 14%           | 13%           | 16%           | 18%           | -             | -             |
| Central & South America   | 12%           | 12%           | 17%           | 16%           | 13%           | 13%           | 10%           | 11%           | 14%           | 15%           | 5%            | 3%            | 18%           | 17%           | 10%           | 14%           | 6%            | 6%            |
| Philippines   | 10%           | 10%           | 15%           | 13%           | 10%           | 10%           | 11%           | 11%           | 7%            | 6%            | 3%            | 3%            | 15%           | 14%           | 12%           | 17%           | 7%            | 7%            |
| India   | 9%            | 9%            | 10%           | 11%           | 12%           | 13%           | 9%            | 8%            | 11%           | 10%           | 5%            | 6%            | 10%           | 8%            | 9%            | 11%           | 6%            | 7%            |
| Africa  | 8%            | 7%            | 9%            | 6%            | 9%            | 12%           | 7%            | 5%            | 12%           | 9%            | 4%            | 3%            | 12%           | 11%           | 10%           | 6%            | 5%            | 4%            |
| Other areas   | 2%            | 2%            | 1%            | 1%            | 0%            | 0%            | 1%            | 2%            | 1%            | 0%            | 3%            | 4%            | 2%            | 2%            | 2%            | 1%            | 3%            | 4%            |
| Not interested in foreign travel  | 1%            | 1%            | 1%            | 1%            | 0%            | 0%            | 3%            | 1%            | 0%            | 0%            | 4%            | 3%            | 1%            | 1%            | 0%            | 0%            | 3%            | 1%            |

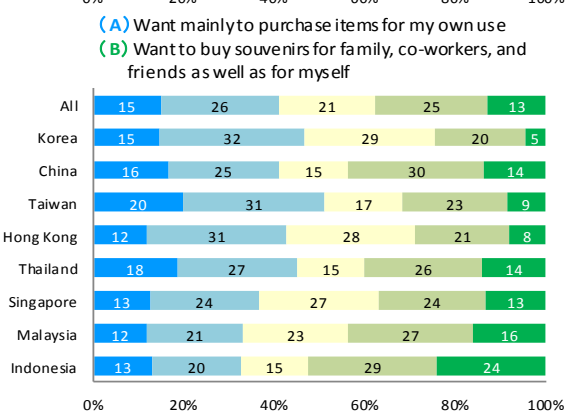
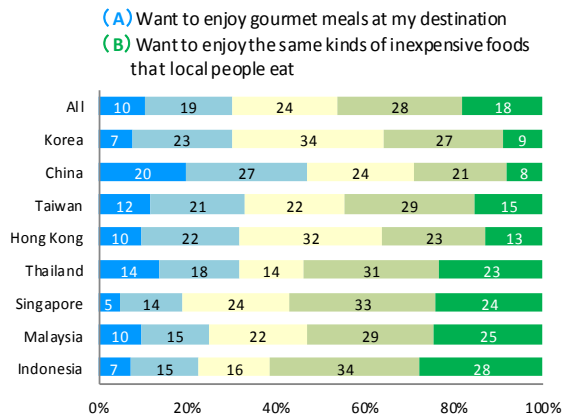
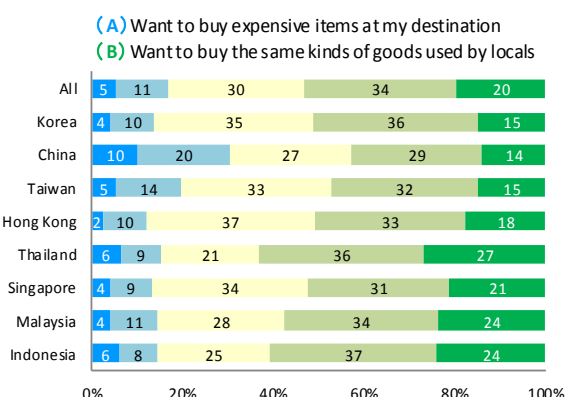
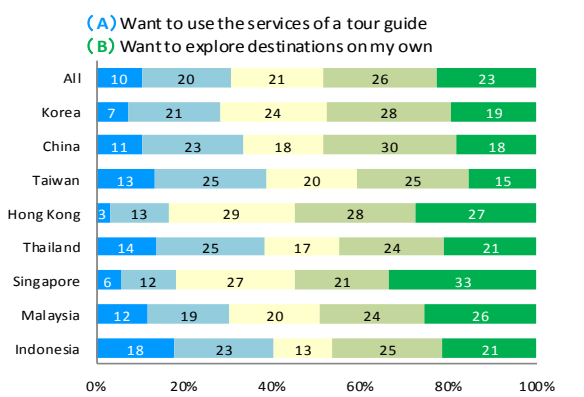
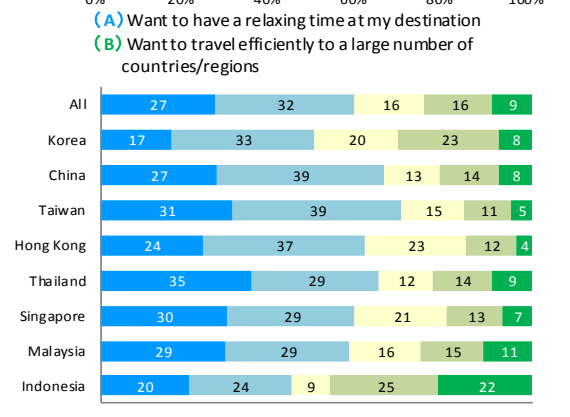
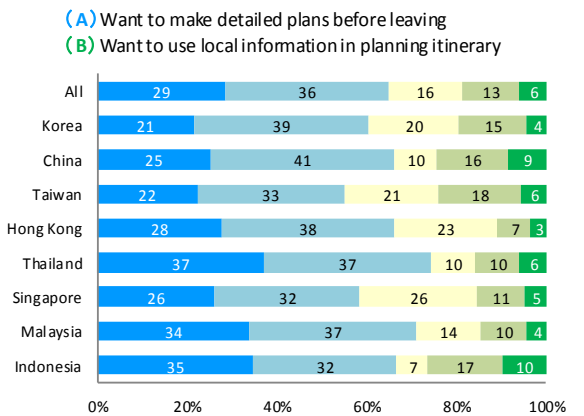
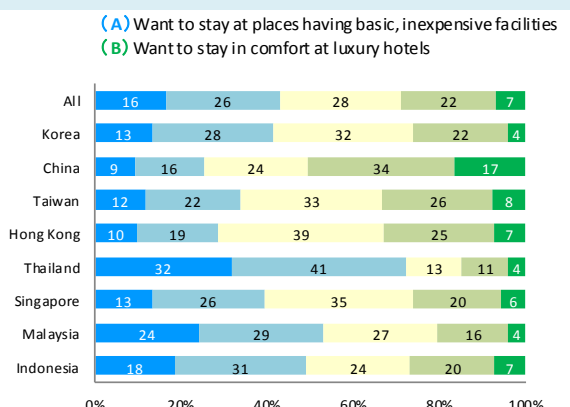
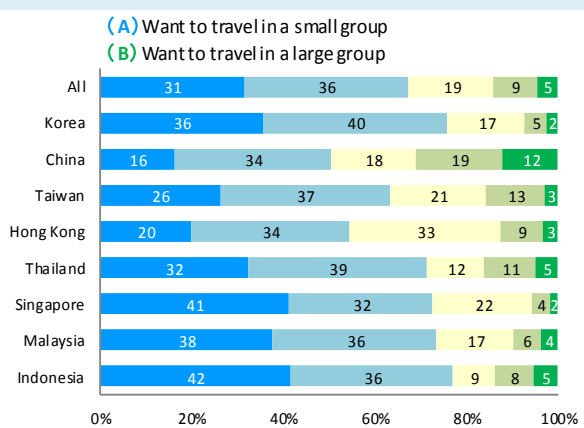
Note: The top 5 items are highlighted in red or green. When a respondent’s home country or region was the same as the place they wanted to visit, that country or region was removed from the sample size.

4. All respondents

General thoughts on foreign travel: "What do you wish for in a foreign holiday?"

◆ **Strong trend toward small-group travel and detailed planning in advance**

- National preferences were diverse in this category, with Thai respondents looking for reasonably priced lodgings and those from Singapore and Hong Kong prioritizing time for free activity.



5. Your most recent trip to Japan: Purpose, companions and mode of travel

◆ **Travel agents remain popular choice, but many travelers reserving online**

- High percentages of respondents from all regions cited “tourism” as the purpose of their most recent trip to Japan.
- Spouses or partners are the companions of choice for many respondents, but those from Indonesia, Thailand, Singapore and Malaysia are more likely than others to travel with their children or with relatives other than parents.
- While foreign independent travel (FIT) is seen as a growing trend, visitors to Japan choose varied modes of travel according to their nationality. Respondents from Taiwan and Thailand continue to prefer guided tours, while there is a clear tendency among those from Singapore, Hong Kong and Malaysia to make arrangements on their own.

Purpose of travel

(Single response)

| Respondents→<br>Sample size         | All  | Korea | China | Taiwan | Hong Kong | Thailand | Singapore | Malaysia | Indonesia |
|-------------------------------------|------|-------|-------|--------|-----------|----------|-----------|----------|-----------|
|                                     | 1867 | 277   | 280   | 344    | 358       | 225      | 182       | 107      | 94        |
| Tourism                             | 87%  | 81%   | 91%   | 90%    | 94%       | 91%      | 86%       | 72%      | 67%       |
| Business, international conferences | 6%   | 7%    | 6%    | 6%     | 2%        | 3%       | 10%       | 13%      | 15%       |
| Training, incentives                | 3%   | 4%    | 2%    | 1%     | 2%        | 4%       | 1%        | 7%       | 11%       |
| Study                               | 1%   | 2%    | 0%    | 0%     | 0%        | 0%       | 0%        | 2%       | 4%        |
| See family or friends               | 2%   | 6%    | 0%    | 2%     | 1%        | 2%       | 2%        | 4%       | 1%        |
| Other                               | 0%   | 0%    | 0%    | 0%     | 1%        | 0%       | 1%        | 2%       | 2%        |

Travel companion(s)

(Multiple responses)

| Respondents→<br>Sample size                | All  | Korea | China | Taiwan | Hong Kong | Thailand | Singapore | Malaysia | Indonesia |
|--|------|-------|-------|--------|-----------|----------|-----------|----------|-----------|
|  | 1867 | 277   | 280   | 344    | 358       | 225      | 182       | 107      | 94        |
| Traveled alone                             | 9%   | 10%   | 11%   | 8%     | 6%        | 10%      | 8%        | 18%      | 9%        |
| Spouse or partner                          | 52%  | 44%   | 62%   | 47%    | 66%       | 44%      | 47%       | 47%      | 50%       |
| Friend                                     | 32%  | 32%   | 29%   | 35%    | 26%       | 37%      | 24%       | 41%      | 36%       |
| Children                                   | 18%  | 14%   | 21%   | 19%    | 18%       | 14%      | 20%       | 14%      | 26%       |
| Parents                                    | 12%  | 5%    | 7%    | 17%    | 13%       | 14%      | 13%       | 12%      | 15%       |
| Relatives (other than children or parents) | 11%  | 10%   | 3%    | 11%    | 7%        | 19%      | 18%       | 16%      | 20%       |
| Other                                      | 3%   | 8%    | 1%    | 2%     | 1%        | 2%       | 2%        | 2%       | 0%        |

Mode of travel (excluding business, international conference, training/incentives, study)

(Single response)

| Respondents→<br>Sample size   | All  | Korea | China | Taiwan | Hong Kong | Thailand | Singapore | Malaysia | Indonesia |
|---|------|-------|-------|--------|-----------|----------|-----------|----------|-----------|
|   | 1678 | 240   | 256   | 319    | 344       | 208      | 162       | 83       | 66        |
| Guided package tour (no free activity)  | 35%  | 32%   | 40%   | 45%    | 23%       | 42%      | 27%       | 27%      | 38%       |
| Guided package tour (with free activity)  | 17%  | 8%    | 21%   | 20%    | 17%       | 19%      | 14%       | 19%      | 17%       |
| Package including airfare and hotels only                                       | 17%  | 23%   | 17%   | 12%    | 24%       | 11%      | 12%       | 18%      | 20%       |
| Separate arrangements for airfare and hotels                                    | 26%  | 26%   | 18%   | 19%    | 32%       | 24%      | 45%       | 31%      | 18%       |
| Purchased airline tickets prior to trip; made hotel arrangements at destination | 5%   | 12%   | 4%    | 3%     | 3%        | 4%       | 2%        | 5%       | 8%        |

Notes: 1 Questions on this page were directed at respondents who had been to Japan in the past, and asked about their mode of travel on their most recent trip.

2 Ranking is indicated by a color scale: Lowest ← → Highest



**Previous visitors to Japan**

6. “How did you arrange for hotel/inn accommodations on your last trip to Japan?”

◆ **Online reservations the norm for travelers not using package tours**

- Most travelers not using package tours make their hotel and other reservations online. Online travel services such as Expedia are notably popular among travelers from Thailand, China and Malaysia. Those from Hong Kong, Singapore and Taiwan prefer to access hotel and other websites directly.
- On their most recent trip to Japan, respondents from China, Taiwan, Hong Kong and Singapore were most likely to stay at a traditional inn (ryokan) or a luxury hotel. Many of those from Thailand, Malaysia and Indonesia, on the other hand, preferred inexpensive hotels as well as traditional inns. Inexpensive hotels were the overwhelming choice of Korean respondents.
- The average length of stay tended to increase in proportion to the home region’s distance from Japan. Compared with visitors from China and Taiwan, those from Hong Kong stayed longer and traveled to a greater number of places.

Arrangement of accommodations (excluding those who traveled on package tours) (Single response)

| Respondents→<br>Sample size                    | All | Korea | China | Taiwan | Hong Kong | Thailand | Singapore | Malaysia | Indonesia |
|--|-----|-------|-------|--------|-----------|----------|-----------|----------|-----------|
| Made each reservation through travel agent     | 10% | 10%   | 16%   | 7%     | 14%       | 5%       | 6%        | 7%       | 18%       |
| Called hotels directly                         | 7%  | 13%   | 13%   | 3%     | 3%        | 3%       | 8%        | 0%       | 12%       |
| Used online travel service (such as Expedia)   | 37% | 18%   | 50%   | 32%    | 39%       | 53%      | 36%       | 47%      | 35%       |
| Reserved online at hotel's website             | 30% | 27%   | 18%   | 31%    | 38%       | 24%      | 38%       | 23%      | 24%       |
| Don't know (reservations made by someone else) | 10% | 18%   | 4%    | 18%    | 4%        | 7%       | 9%        | 20%      | 0%        |
| None of the above                              | 6%  | 14%   | 0%    | 8%     | 3%        | 7%       | 3%        | 3%       | 12%       |

Types of lodgings (Multiple responses)

| Respondents<br>Sample size                              | All | Korea | China | Taiwan | Hong Kong | Thailand | Singapore | Malaysia | Indonesia |
|---|-----|-------|-------|--------|-----------|----------|-----------|----------|-----------|
| Japanese inn (ryokan)                                   | 45% | 23%   | 59%   | 43%    | 54%       | 45%      | 48%       | 41%      | 49%       |
| Comfortable luxury hotel (Western-style)                | 41% | 20%   | 59%   | 52%    | 51%       | 22%      | 43%       | 35%      | 18%       |
| Inexpensive hotel with basic facilities (Western-style) | 41% | 58%   | 26%   | 30%    | 41%       | 56%      | 37%       | 50%      | 45%       |
| Youth hostel  | 9%  | 14%   | 8%    | 7%     | 8%        | 8%       | 8%        | 13%      | 16%       |
| Other   | 3%  | 6%    | 1%    | 3%     | 2%        | 3%       | 2%        | 1%       | 4%        |

Length of stay and number of places visited

| Respondents→<br>Sample size          | All | Korea | China | Taiwan | Hong Kong | Thailand | Singapore | Malaysia | Indonesia |
|--------------------------------------|-----|-------|-------|--------|-----------|----------|-----------|----------|-----------|
| Average length of stay (in days)     | 6.9 | 4.8   | 6.3   | 5.9    | 7.3       | 7.1      | 9.3       | 8.8      | 9.7       |
| 1-3                                  | 12% | 39%   | 8%    | 8%     | 2%        | 11%      | 5%        | 7%       | 9%        |
| 4-5                                  | 41% | 45%   | 41%   | 61%    | 39%       | 42%      | 17%       | 21%      | 30%       |
| 6-7                                  | 26% | 8%    | 31%   | 21%    | 37%       | 27%      | 31%       | 30%      | 21%       |
| 8-9                                  | 7%  | 2%    | 10%   | 3%     | 9%        | 6%       | 16%       | 12%      | 3%        |
| 10 or more                           | 14% | 6%    | 10%   | 6%     | 13%       | 15%      | 30%       | 29%      | 37%       |
| Average number of places stayed      | 2.9 | 2.1   | 2.9   | 2.9    | 3.4       | 2.9      | 2.9       | 2.8      | 3.0       |
| Percentage who remained in one place | 20% | 36%   | 13%   | 18%    | 14%       | 18%      | 20%       | 25%      | 24%       |

Notes: 1 Questions on this page were directed at respondents who had been to Japan in the past, and asked about their mode of travel on their most recent trip.

2 Ranking is indicated by a color scale: Lowest ←→ Highest



Previous visitors  
to Japan

7. "Which areas of Japan have you visited up to now?"

◆ **Tokyo, "Golden Route"\* and Hokkaido were favorite destinations on previous trips to Japan**

- Kyushu has been a popular destination for visitors from Hong Kong, Indonesia and Korea.
- The survey revealed a notable increase in visitors to Mt. Fuji in comparison with last year (2013: 33% → 2014: 38%) – likely due to Mt. Fuji's designation in June 2013 as a World Heritage Site.

\* The "Golden Route," stretching from Tokyo to Osaka, has been the standard course for a Japan vacation.

(Multiple responses)

| Respondents                     | All  | Korea | China | Taiwan | Hong Kong | Thailand | Singapore | Malaysia | Indonesia |
|---------------------------------|------|-------|-------|--------|-----------|----------|-----------|----------|-----------|
| Sample size                     | 1867 | 277   | 280   | 344    | 358       | 225      | 182       | 107      | 94        |
| Tokyo                           | 68%  | 54%   | 68%   | 62%    | 75%       | 70%      | 83%       | 62%      | 70%       |
| Mt. Fuji                        | 38%  | 14%   | 53%   | 23%    | 45%       | 49%      | 45%       | 42%      | 57%       |
| Hakone                          | 18%  | 10%   | 15%   | 23%    | 27%       | 17%      | 18%       | 12%      | 9%        |
| Nikko                           | 6%   | 3%    | 6%    | 8%     | 6%        | 10%      | 6%        | 6%       | 6%        |
| Matsumoto                       | 2%   | 1%    | 5%    | 1%     | 1%        | 3%       | 1%        | 5%       | 7%        |
| Karuizawa                       | 5%   | 1%    | 3%    | 11%    | 9%        | 2%       | 1%        | 2%       | 4%        |
| Hokkaido                        | 30%  | 11%   | 34%   | 35%    | 39%       | 28%      | 27%       | 30%      | 35%       |
| Sapporo                         | 21%  | 12%   | 16%   | 26%    | 31%       | 18%      | 23%       | 12%      | 19%       |
| Hakodate                        | 11%  | 5%    | 3%    | 22%    | 20%       | 5%       | 9%        | 6%       | 5%        |
| Obihiro, Tokachi                | 3%   | 0%    | 3%    | 5%     | 2%        | 2%       | 2%        | 3%       | 3%        |
| Niseko                          | 1%   | 1%    | 3%    | 1%     | 1%        | 3%       | 1%        | 3%       | 1%        |
| Shiretoko                       | 2%   | 0%    | 1%    | 2%     | 4%        | 2%       | 1%        | 5%       | 4%        |
| Kushiro, Akan                   | 3%   | 0%    | 3%    | 4%     | 4%        | 3%       | 3%        | 1%       | 2%        |
| Tohoku                          | 3%   | 1%    | 2%    | 4%     | 4%        | 4%       | 3%        | 5%       | 4%        |
| Aomori                          | 5%   | 4%    | 4%    | 8%     | 8%        | 4%       | 2%        | 7%       | 5%        |
| Sendai                          | 8%   | 3%    | 10%   | 7%     | 12%       | 13%      | 4%        | 7%       | 12%       |
| Matsushima                      | 4%   | 0%    | 8%    | 3%     | 8%        | 3%       | 0%        | 3%       | 4%        |
| Hiraizumi                       | 2%   | 1%    | 2%    | 1%     | 1%        | 2%       | 1%        | 5%       | 4%        |
| Niigata                         | 4%   | 1%    | 3%    | 3%     | 5%        | 4%       | 3%        | 9%       | 6%        |
| Sado                            | 1%   | 0%    | 2%    | 1%     | 1%        | 2%       | 1%        | 3%       | 3%        |
| Hokuriku                        | 3%   | 0%    | 4%    | 6%     | 2%        | 2%       | 2%        | 4%       | 2%        |
| Kanazawa                        | 4%   | 0%    | 1%    | 6%     | 6%        | 5%       | 2%        | 6%       | 5%        |
| Tateyama, Kurobe                | 5%   | 1%    | 1%    | 13%    | 8%        | 4%       | 1%        | 4%       | 1%        |
| Toyama                          | 6%   | 0%    | 13%   | 6%     | 10%       | 5%       | 5%        | 3%       | 4%        |
| Nagoya                          | 24%  | 14%   | 32%   | 24%    | 30%       | 18%      | 16%       | 20%      | 44%       |
| Ise, Shima                      | 3%   | 1%    | 3%    | 3%     | 3%        | 4%       | 2%        | 3%       | 4%        |
| Hida, Takayama                  | 5%   | 1%    | 2%    | 10%    | 6%        | 4%       | 3%        | 7%       | 2%        |
| Kansai                          | 15%  | 9%    | 9%    | 24%    | 23%       | 15%      | 3%        | 18%      | 17%       |
| Kyoto                           | 42%  | 33%   | 45%   | 43%    | 48%       | 40%      | 34%       | 44%      | 45%       |
| Nara                            | 18%  | 16%   | 15%   | 24%    | 27%       | 17%      | 12%       | 15%      | 7%        |
| Osaka                           | 48%  | 45%   | 44%   | 47%    | 62%       | 39%      | 40%       | 46%      | 54%       |
| Kobe                            | 19%  | 11%   | 20%   | 25%    | 28%       | 11%      | 12%       | 18%      | 28%       |
| Okayama                         | 4%   | 2%    | 3%    | 6%     | 4%        | 5%       | 2%        | 6%       | 4%        |
| Hiroshima                       | 9%   | 3%    | 10%   | 8%     | 8%        | 12%      | 9%        | 13%      | 20%       |
| Sannin                          | 1%   | 0%    | 2%    | 1%     | 0%        | 2%       | 1%        | 2%       | 3%        |
| Tottori                         | 2%   | 3%    | 1%    | 1%     | 1%        | 0%       | 2%        | 1%       | 4%        |
| Matsui, Izumo                   | 2%   | 1%    | 3%    | 1%     | 1%        | 3%       | 2%        | 2%       | 2%        |
| Shikoku                         | 5%   | 1%    | 6%    | 5%     | 6%        | 7%       | 2%        | 8%       | 9%        |
| Shimanami Kaido                 | 2%   | 1%    | 3%    | 1%     | 0%        | 3%       | 2%        | 1%       | 5%        |
| Takamatsu                       | 2%   | 0%    | 3%    | 2%     | 2%        | 4%       | 1%        | 4%       | 4%        |
| Matsuyama, Dogo                 | 2%   | 1%    | 4%    | 1%     | 2%        | 4%       | 2%        | 3%       | 2%        |
| Kyushu                          | 17%  | 16%   | 12%   | 22%    | 30%       | 8%       | 9%        | 7%       | 11%       |
| Fukuoku, Hakata                 | 16%  | 23%   | 10%   | 20%    | 20%       | 13%      | 11%       | 9%       | 14%       |
| Nagasaki                        | 11%  | 6%    | 10%   | 12%    | 14%       | 12%      | 4%        | 14%      | 30%       |
| Beppu, Yufuin                   | 7%   | 11%   | 2%    | 6%     | 13%       | 4%       | 4%        | 2%       | 3%        |
| Kumamoto, Aso                   | 7%   | 8%    | 3%    | 8%     | 16%       | 3%       | 1%        | 3%       | 3%        |
| Miyazaki                        | 6%   | 1%    | 8%    | 6%     | 11%       | 6%       | 2%        | 1%       | 12%       |
| Kagoshima                       | 7%   | 3%    | 9%    | 7%     | 16%       | 4%       | 1%        | 5%       | 11%       |
| Okinawa                         | 16%  | 10%   | 13%   | 23%    | 24%       | 11%      | 8%        | 10%      | 22%       |
| Don't remember / not applicable | 2%   | 3%    | 0%    | 1%     | 1%        | 1%       | 3%        | 3%       | 4%        |

Notes: 1 The question on this page was directed at respondents who had been to Japan in the past, and asked about their mode of travel on past trips.

2 The top 5 items are indicated in red; the 6<sup>th</sup> through 10<sup>th</sup> are indicated in pink.

Previous visitors to Japan

8. "When planning your trip to Japan, did you consider other countries or regions?"

◆ **Korea was the destination most commonly considered as a possible alternative to Japan.**

- Respondents who had visited Japan in the past were most likely to consider Korea as an alternative destination, followed by Hong Kong, Taiwan, Singapore, and mainland China – all regions in Asia, and relatively close to Japan. These findings were fundamentally unchanged from those of the last two surveys.
- A substantial proportion of the respondents did not consider any other destination besides Japan. About half of those from Korea and Singapore visit Japan without giving thought to other possible candidates.

(Multiple responses)

| Respondents                                | All |           | Korea |           | China |           | Taiwan |           | Hong Kong |           | Thailand |           | Singapore |           | Malaysia |           | Indonesia |           |
|--|-----|-----------|-------|-----------|-------|-----------|--------|-----------|-----------|-----------|----------|-----------|-----------|-----------|----------|-----------|-----------|-----------|
|  | 1   | 2 or more | 1     | 2 or more | 1     | 2 or more | 1      | 2 or more | 1         | 2 or more | 1        | 2 or more | 1         | 2 or more | 1        | 2 or more | 1         | 2 or more |
| Sample size                                | 851 | 1016      | 112   | 165       | 170   | 110       | 114    | 230       | 105       | 253       | 125      | 100       | 96        | 86        | 70       | 37        | 59        | 35        |
| Korea                                      | 33% | 37%       | -     | -         | 44%   | 49%       | 18%    | 24%       | 40%       | 47%       | 31%      | 33%       | 22%       | 26%       | 33%      | 41%       | 36%       | 40%       |
| Hong Kong                                  | 21% | 21%       | 20%   | 18%       | 26%   | 32%       | 29%    | 20%       | -         | -         | 21%      | 25%       | 7%        | 9%        | 16%      | 14%       | 19%       | 37%       |
| Taiwan                                     | 17% | 19%       | 7%    | 11%       | 22%   | 21%       | -      | -         | 27%       | 30%       | 9%       | 11%       | 14%       | 12%       | 20%      | 19%       | 20%       | 11%       |
| Singapore                                  | 14% | 15%       | 8%    | 11%       | 13%   | 22%       | 20%    | 19%       | 13%       | 11%       | 15%      | 14%       | -         | -         | 9%       | 8%        | 15%       | 17%       |
| Mainland China                             | 14% | 16%       | 9%    | 18%       | -     | -         | 25%    | 25%       | 15%       | 8%        | 17%      | 18%       | 4%        | 7%        | 11%      | 22%       | 10%       | 17%       |
| Australia                                  | 11% | 14%       | 5%    | 5%        | 12%   | 16%       | 9%     | 16%       | 15%       | 15%       | 7%       | 11%       | 5%        | 10%       | 17%      | 22%       | 20%       | 34%       |
| New Zealand                                | 8%  | 12%       | 1%    | 5%        | 9%    | 12%       | 17%    | 19%       | 6%        | 11%       | 6%       | 9%        | 3%        | 8%        | 11%      | 19%       | 15%       | 23%       |
| Macao                                      | 9%  | 10%       | 5%    | 8%        | 14%   | 19%       | 18%    | 15%       | 10%       | 5%        | 4%       | 6%        | 1%        | 3%        | 4%       | 8%        | 12%       | 11%       |
| Thailand                                   | 8%  | 12%       | 4%    | 11%       | 11%   | 10%       | 11%    | 12%       | 10%       | 16%       | -        | -         | 1%        | 6%        | 6%       | 5%        | 14%       | 14%       |
| France                                     | 7%  | 9%        | 3%    | 5%        | 6%    | 14%       | 11%    | 14%       | 10%       | 6%        | 2%       | 7%        | 2%        | 2%        | 10%      | 16%       | 17%       | 11%       |
| Switzerland                                | 6%  | 9%        | 3%    | 5%        | 4%    | 9%        | 7%     | 16%       | 9%        | 7%        | 6%       | 7%        | 2%        | 5%        | 7%       | 16%       | 19%       | 11%       |
| Hawaii                                     | 7%  | 8%        | 3%    | 5%        | 8%    | 14%       | 12%    | 15%       | 9%        | 5%        | 1%       | 5%        | 3%        | 0%        | 9%       | 8%        | 10%       | 9%        |
| Germany                                    | 5%  | 9%        | 1%    | 2%        | 4%    | 14%       | 6%     | 13%       | 7%        | 8%        | 4%       | 4%        | 2%        | 3%        | 6%       | 16%       | 22%       | 23%       |
| United Kingdom                             | 6%  | 8%        | 0%    | 2%        | 5%    | 14%       | 9%     | 9%        | 8%        | 7%        | 6%       | 8%        | 2%        | 1%        | 9%       | 14%       | 19%       | 17%       |
| Italy                                      | 6%  | 7%        | 2%    | 3%        | 4%    | 7%        | 7%     | 11%       | 8%        | 6%        | 5%       | 5%        | 1%        | 2%        | 7%       | 11%       | 17%       | 11%       |
| USA  | 5%  | 7%        | 2%    | 0%        | 4%    | 14%       | 11%    | 14%       | 2%        | 3%        | 4%       | 7%        | 0%        | 1%        | 6%       | 16%       | 14%       | 6%        |
| Canada                                     | 4%  | 8%        | 1%    | 4%        | 3%    | 9%        | 5%     | 13%       | 7%        | 6%        | 1%       | 5%        | 3%        | 1%        | 6%       | 8%        | 5%        | 17%       |
| Malaysia                                   | 5%  | 6%        | 2%    | 1%        | 6%    | 10%       | 7%     | 10%       | 8%        | 7%        | 3%       | 3%        | 0%        | 1%        | -        | -         | 14%       | 14%       |
| Spain                                      | 3%  | 7%        | 0%    | 2%        | 2%    | 9%        | 4%     | 13%       | 7%        | 6%        | 1%       | 3%        | 0%        | 2%        | 6%       | 5%        | 10%       | 11%       |
| Guam                                       | 2%  | 7%        | 4%    | 6%        | 1%    | 9%        | 8%     | 13%       | 1%        | 7%        | 0%       | 0%        | 0%        | 0%        | 3%       | 3%        | 3%        | 3%        |
| Vietnam                                    | 4%  | 5%        | 7%    | 4%        | 3%    | 5%        | 4%     | 5%        | 5%        | 3%        | 6%       | 8%        | 0%        | 1%        | 1%       | 11%       | 10%       | 6%        |
| Other Europe                               | 2%  | 5%        | 0%    | 2%        | 1%    | 5%        | 4%     | 6%        | 3%        | 6%        | 2%       | 2%        | 0%        | 2%        | 3%       | 8%        | 12%       | 6%        |
| Austria                                    | 2%  | 5%        | 0%    | 2%        | 2%    | 6%        | 4%     | 8%        | 3%        | 5%        | 2%       | 0%        | 0%        | 1%        | 1%       | 5%        | 7%        | 9%        |
| Indonesia                                  | 2%  | 4%        | 1%    | 2%        | 2%    | 5%        | 4%     | 8%        | 1%        | 0%        | 2%       | 7%        | 0%        | 1%        | 4%       | 11%       | -         | -         |
| Philippines                                | 2%  | 3%        | 4%    | 5%        | 1%    | 3%        | 2%     | 4%        | 2%        | 0%        | 0%       | 2%        | 1%        | 0%        | 9%       | 8%        | 5%        | 6%        |
| Mideast (Dubai, etc.)                      | 3%  | 2%        | 0%    | 1%        | 2%    | 3%        | 2%     | 3%        | 3%        | 3%        | 0%       | 2%        | 0%        | 0%        | 1%       | 5%        | 20%       | 3%        |
| India                                      | 2%  | 2%        | 0%    | 2%        | 1%    | 5%        | 0%     | 2%        | 4%        | 2%        | 1%       | 2%        | 1%        | 0%        | 1%       | 3%        | 10%       | 9%        |
| Central & South America                    | 1%  | 2%        | 0%    | 1%        | 1%    | 3%        | 1%     | 2%        | 0%        | 1%        | 0%       | 1%        | 0%        | 0%        | 1%       | 3%        | 2%        | 6%        |
| Africa                                     | 1%  | 1%        | 0%    | 1%        | 1%    | 2%        | 1%     | 1%        | 1%        | 1%        | 0%       | 0%        | 1%        | 1%        | 1%       | 0%        | 3%        | 3%        |
| Other                                      | 1%  | 1%        | 0%    | 1%        | 1%    | 1%        | 2%     | 0%        | 1%        | 0%        | 1%       | 3%        | 0%        | 0%        | 0%       | 0%        | 0%        | 0%        |
| Didn't consider other countries or regions | 34% | 28%       | 58%   | 44%       | 26%   | 16%       | 30%    | 25%       | 28%       | 19%       | 29%      | 24%       | 57%       | 53%       | 33%      | 35%       | 5%        | 6%        |

Notes: 1 The question on this page was directed at respondents who had been to Japan in the past, and asked about other destinations they may have considered when planning their most recent trip. When a respondent's home country or region was the same as the alternate destination they were considering, that country or region was removed from the sample size.  
 2 The top 5 items are indicated in red or yellow.

Previous visitors to Japan

9. “Why did you choose Japan as your destination?”

◆ **Food, scenery, hot springs, safety, and culture and history were the five biggest decisive factors.**

- Korean respondents also liked the “short length of journey,” while those from Indonesia and Singapore mentioned “interest in Japanese science and technology” and “low prices” respectively.
- Shopping was a major attraction for repeat visitors, as was ease of access as represented by the availability of nonstop flights and the short length of the journey.
- Notable in this year’s finding was an increase in the percentage of respondents citing an “interest in Japan’s World Heritage Sites” as a reason for choosing to visit.

(Multiple responses)

| Respondents<br>Reasons / Number of visits to Japan                       | All |           | Korea |           | China |           | Taiwan |           | Hong Kong |           | Thailand |           | Singapore |           | Malaysia |           | Indonesia |           |
|--|-----|-----------|-------|-----------|-------|-----------|--------|-----------|-----------|-----------|----------|-----------|-----------|-----------|----------|-----------|-----------|-----------|
|  | 1   | 2 or more | 1     | 2 or more | 1     | 2 or more | 1      | 2 or more | 1         | 2 or more | 1        | 2 or more | 1         | 2 or more | 1        | 2 or more | 1         | 2 or more |
| Sample size  | 851 | 1016      | 112   | 165       | 170   | 110       | 114    | 230       | 105       | 253       | 125      | 100       | 96        | 86        | 70       | 37        | 59        | 35        |
| Interest in Japanese food  | 50% | 54%       | 28%   | 34%       | 45%   | 51%       | 41%    | 53%       | 56%       | 63%       | 66%      | 69%       | 53%       | 55%       | 56%      | 51%       | 61%       | 63%       |
| Interest in Japan's nature and scenery                                   | 47% | 48%       | 27%   | 31%       | 58%   | 60%       | 45%    | 50%       | 27%       | 46%       | 60%      | 58%       | 45%       | 40%       | 56%      | 54%       | 63%       | 66%       |
| Interest in Japanese hot springs   | 39% | 42%       | 29%   | 34%       | 55%   | 54%       | 36%    | 39%       | 30%       | 47%       | 48%      | 45%       | 29%       | 34%       | 40%      | 35%       | 32%       | 46%       |
| High level of safety   | 34% | 43%       | 21%   | 22%       | 33%   | 37%       | 40%    | 56%       | 32%       | 44%       | 42%      | 58%       | 28%       | 37%       | 46%      | 38%       | 31%       | 46%       |
| Interest in Japanese culture and history                                 | 37% | 37%       | 21%   | 19%       | 39%   | 45%       | 40%    | 41%       | 24%       | 29%       | 46%      | 55%       | 34%       | 35%       | 40%      | 51%       | 66%       | 71%       |
| Desire to shop in Japan  | 33% | 39%       | 9%    | 18%       | 42%   | 49%       | 31%    | 36%       | 40%       | 51%       | 42%      | 44%       | 26%       | 41%       | 30%      | 35%       | 37%       | 37%       |
| Interest in Japan's World Heritage Sites                                 | 27% | 27%       | 8%    | 11%       | 29%   | 34%       | 22%    | 30%       | 19%       | 23%       | 43%      | 48%       | 24%       | 17%       | 27%      | 35%       | 53%       | 57%       |
| Nonstop flights available  | 22% | 30%       | 13%   | 20%       | 29%   | 34%       | 22%    | 34%       | 11%       | 31%       | 34%      | 36%       | 16%       | 22%       | 27%      | 30%       | 19%       | 40%       |
| Recommendation of friend or acquaintance                                 | 25% | 22%       | 25%   | 22%       | 25%   | 35%       | 36%    | 23%       | 21%       | 16%       | 25%      | 25%       | 20%       | 20%       | 24%      | 19%       | 27%       | 26%       |
| Short length of journey  | 21% | 26%       | 34%   | 38%       | 28%   | 29%       | 21%    | 28%       | 14%       | 20%       | 18%      | 31%       | 14%       | 12%       | 11%      | 14%       | 14%       | 20%       |
| Interest in Japanese fashion, games or anime                             | 19% | 22%       | 8%    | 9%        | 24%   | 37%       | 17%    | 16%       | 13%       | 30%       | 17%      | 25%       | 20%       | 10%       | 27%      | 27%       | 27%       | 40%       |
| Interest in Japanese science and technology                              | 21% | 18%       | 5%    | 8%        | 25%   | 35%       | 13%    | 12%       | 10%       | 15%       | 29%      | 27%       | 16%       | 12%       | 33%      | 30%       | 49%       | 54%       |
| Interest in Japanese railroads   | 17% | 21%       | 1%    | 4%        | 16%   | 20%       | 14%    | 20%       | 13%       | 22%       | 27%      | 36%       | 7%        | 19%       | 23%      | 27%       | 44%       | 43%       |
| Low prices   | 18% | 19%       | 17%   | 18%       | 9%    | 13%       | 14%    | 14%       | 15%       | 24%       | 23%      | 18%       | 30%       | 26%       | 23%      | 24%       | 19%       | 9%        |
| Recommendation of family member  | 18% | 17%       | 12%   | 10%       | 12%   | 19%       | 24%    | 20%       | 17%       | 15%       | 18%      | 18%       | 24%       | 19%       | 17%      | 8%        | 25%       | 26%       |
| Article in newspaper or magazine   | 12% | 14%       | 3%    | 5%        | 13%   | 26%       | 10%    | 11%       | 10%       | 13%       | 14%      | 18%       | 11%       | 10%       | 21%      | 22%       | 15%       | 29%       |
| Low-cost carrier available   | 12% | 12%       | 4%    | 5%        | 8%    | 19%       | 5%     | 9%        | 7%        | 9%        | 20%      | 25%       | 7%        | 5%        | 26%      | 16%       | 41%       | 29%       |
| Internet advertisement; good reviews on blogs or social networking sites | 11% | 12%       | 5%    | 13%       | 16%   | 27%       | 11%    | 10%       | 7%        | 4%        | 14%      | 19%       | 1%        | 5%        | 14%      | 8%        | 24%       | 20%       |
| Japanese tourism campaign  | 10% | 11%       | 2%    | 3%        | 5%    | 12%       | 4%     | 5%        | 10%       | 14%       | 17%      | 14%       | 9%        | 12%       | 24%      | 24%       | 27%       | 29%       |
| TV advertisement   | 11% | 9%        | 2%    | 8%        | 18%   | 23%       | 3%     | 5%        | 5%        | 5%        | 19%      | 15%       | 11%       | 10%       | 14%      | 8%        | 20%       | 20%       |
| Interest in Japanese sports  | 6%  | 7%        | 2%    | 4%        | 9%    | 12%       | 6%     | 7%        | 3%        | 6%        | 6%       | 7%        | 3%        | 5%        | 6%       | 8%        | 10%       | 29%       |
| Other  | 4%  | 3%        | 9%    | 5%        | 1%    | 0%        | 3%     | 4%        | 2%        | 2%        | 3%       | 1%        | 10%       | 3%        | 4%       | 8%        | 2%        | 0%        |

Notes: 1 This question was directed at respondents who had been to Japan in the past, and asked about their reasons for choosing Japan for their most recent trip.

2 The top 5 items are indicated in red or yellow.

10. "What were your sources of information on Japan?"

◆ Travelers are using diverse sources of information, both before and during their visit.

- Before setting out, travelers gather information from print media, such as guidebooks, but augment this with information from friends, immediate family and other relatives. During their visit, they visit tourist information centers and enlist the help of lodgings staff and other local sources, as well as utilizing free travel guides or brochures.

Sources of information before arriving in Japan

(Multiple responses)

| Respondents  | All |           | Korea |           | China |           | Taiwan |           | Hong Kong |           | Thailand |           | Singapore |           | Malaysia |           | Indonesia |           |
|--|-----|-----------|-------|-----------|-------|-----------|--------|-----------|-----------|-----------|----------|-----------|-----------|-----------|----------|-----------|-----------|-----------|
|  | 1   | 2 or more | 1     | 2 or more | 1     | 2 or more | 1      | 2 or more | 1         | 2 or more | 1        | 2 or more | 1         | 2 or more | 1        | 2 or more | 1         | 2 or more |
| Sample size  | 851 | 1016      | 112   | 165       | 170   | 110       | 114    | 230       | 105       | 253       | 125      | 100       | 96        | 86        | 70       | 37        | 59        | 35        |
| Travel guidebook   | 37% | 41%       | 31%   | 30%       | 32%   | 38%       | 42%    | 38%       | 41%       | 51%       | 42%      | 45%       | 24%       | 36%       | 47%      | 30%       | 44%       | 49%       |
| Friends  | 39% | 37%       | 34%   | 28%       | 40%   | 47%       | 37%    | 38%       | 46%       | 38%       | 38%      | 32%       | 35%       | 35%       | 39%      | 41%       | 49%       | 46%       |
| Travel magazine  | 31% | 35%       | 16%   | 17%       | 39%   | 48%       | 32%    | 32%       | 36%       | 48%       | 32%      | 43%       | 11%       | 13%       | 31%      | 32%       | 46%       | 43%       |
| Family, relatives  | 32% | 32%       | 18%   | 24%       | 34%   | 44%       | 40%    | 37%       | 27%       | 31%       | 26%      | 31%       | 33%       | 26%       | 43%      | 24%       | 44%       | 26%       |
| Website of the Japan National Tourist Organization or Japan Tourism Agency | 26% | 35%       | 13%   | 13%       | 26%   | 41%       | 24%    | 33%       | 16%       | 44%       | 26%      | 39%       | 35%       | 35%       | 41%      | 54%       | 42%       | 51%       |
| Travel agency website  | 26% | 28%       | 25%   | 34%       | 29%   | 38%       | 19%    | 16%       | 19%       | 31%       | 30%      | 34%       | 23%       | 23%       | 29%      | 19%       | 36%       | 31%       |
| Personal blog  | 22% | 26%       | 29%   | 30%       | 17%   | 21%       | 31%    | 30%       | 19%       | 25%       | 30%      | 33%       | 5%        | 12%       | 23%      | 22%       | 27%       | 26%       |
| TripAdvisor or similar site with user-generated content                    | 23% | 22%       | 7%    | 12%       | 39%   | 41%       | 10%    | 14%       | 16%       | 18%       | 29%      | 29%       | 21%       | 30%       | 21%      | 32%       | 32%       | 43%       |
| TV program   | 21% | 23%       | 4%    | 16%       | 20%   | 33%       | 26%    | 24%       | 21%       | 21%       | 27%      | 23%       | 18%       | 23%       | 23%      | 24%       | 32%       | 23%       |
| Co-workers   | 22% | 20%       | 14%   | 12%       | 27%   | 28%       | 14%    | 22%       | 20%       | 17%       | 26%      | 23%       | 17%       | 24%       | 29%      | 30%       | 32%       | 26%       |
| Travel agency counter  | 21% | 21%       | 13%   | 15%       | 30%   | 32%       | 23%    | 16%       | 21%       | 19%       | 23%      | 32%       | 13%       | 19%       | 17%      | 24%       | 19%       | 29%       |
| Travel agency pamphlet   | 19% | 19%       | 8%    | 15%       | 24%   | 27%       | 30%    | 21%       | 19%       | 19%       | 10%      | 8%        | 16%       | 22%       | 23%      | 16%       | 20%       | 20%       |
| Official website of local government, tourism bureau, etc.                 | 14% | 18%       | 2%    | 3%        | 15%   | 21%       | 5%     | 11%       | 16%       | 27%       | 16%      | 19%       | 18%       | 21%       | 26%      | 38%       | 19%       | 37%       |
| Social network, Twitter  | 13% | 19%       | 6%    | 13%       | 29%   | 38%       | 1%     | 3%        | 18%       | 33%       | 5%       | 8%        | 3%        | 3%        | 6%       | 11%       | 36%       | 60%       |
| Pamphlet or campaign   | 15% | 14%       | 4%    | 6%        | 15%   | 18%       | 8%     | 15%       | 9%        | 12%       | 16%      | 17%       | 17%       | 16%       | 34%      | 27%       | 27%       | 29%       |
| Family or friends in Japan   | 13% | 14%       | 11%   | 15%       | 12%   | 20%       | 6%     | 10%       | 5%        | 9%        | 14%      | 22%       | 20%       | 13%       | 13%      | 22%       | 31%       | 37%       |
| Newspaper  | 11% | 13%       | 1%    | 4%        | 14%   | 21%       | 9%     | 10%       | 11%       | 18%       | 9%       | 14%       | 11%       | 16%       | 17%      | 14%       | 19%       | 17%       |
| Other  | 1%  | 2%        | 4%    | 3%        | 1%    | 0%        | 1%     | 1%        | 0%        | 1%        | 1%       | 1%        | 1%        | 3%        | 1%       | 5%        | 2%        | 0%        |

Sources of information after arriving in Japan

(Multiple responses)

| Respondents  | All |           | Korea |           | China |           | Taiwan |           | Hong Kong |           | Thailand |           | Singapore |           | Malaysia |           | Indonesia |           |
|--|-----|-----------|-------|-----------|-------|-----------|--------|-----------|-----------|-----------|----------|-----------|-----------|-----------|----------|-----------|-----------|-----------|
|  | 1   | 2 or more | 1     | 2 or more | 1     | 2 or more | 1      | 2 or more | 1         | 2 or more | 1        | 2 or more | 1         | 2 or more | 1        | 2 or more | 1         | 2 or more |
| Sample size  | 851 | 1016      | 112   | 165       | 170   | 110       | 114    | 230       | 105       | 253       | 125      | 100       | 96        | 86        | 70       | 37        | 59        | 35        |
| Travel guidebook   | 33% | 36%       | 27%   | 32%       | 30%   | 38%       | 38%    | 33%       | 28%       | 42%       | 36%      | 37%       | 28%       | 29%       | 40%      | 24%       | 46%       | 43%       |
| Tourist information center   | 28% | 31%       | 27%   | 22%       | 25%   | 35%       | 20%    | 20%       | 26%       | 40%       | 35%      | 48%       | 29%       | 35%       | 40%      | 32%       | 34%       | 20%       |
| Free travel guide  | 27% | 32%       | 21%   | 23%       | 26%   | 36%       | 23%    | 30%       | 23%       | 34%       | 30%      | 38%       | 25%       | 31%       | 39%      | 35%       | 36%       | 31%       |
| Free pamphlet or brochure  | 24% | 29%       | 20%   | 21%       | 29%   | 35%       | 27%    | 36%       | 16%       | 30%       | 9%       | 14%       | 26%       | 31%       | 41%      | 38%       | 39%       | 37%       |
| Staff of hotel or inn  | 25% | 29%       | 13%   | 15%       | 31%   | 44%       | 18%    | 30%       | 20%       | 27%       | 29%      | 35%       | 25%       | 29%       | 34%      | 32%       | 32%       | 37%       |
| Travel magazine  | 21% | 24%       | 9%    | 10%       | 26%   | 43%       | 22%    | 18%       | 22%       | 28%       | 24%      | 34%       | 8%        | 13%       | 29%      | 19%       | 29%       | 37%       |
| Tour guide   | 24% | 20%       | 21%   | 24%       | 26%   | 23%       | 27%    | 16%       | 14%       | 15%       | 26%      | 29%       | 11%       | 16%       | 31%      | 22%       | 41%       | 34%       |
| Website of the Japan National Tourist Organization or Japan Tourism Agency | 19% | 23%       | 5%    | 10%       | 26%   | 35%       | 12%    | 23%       | 15%       | 24%       | 23%      | 27%       | 18%       | 16%       | 26%      | 30%       | 34%       | 40%       |
| Travel agency pamphlet   | 20% | 19%       | 10%   | 17%       | 28%   | 35%       | 29%    | 18%       | 17%       | 15%       | 10%      | 11%       | 16%       | 12%       | 23%      | 22%       | 25%       | 37%       |
| Travel agency website  | 18% | 19%       | 12%   | 15%       | 25%   | 35%       | 10%    | 10%       | 17%       | 22%       | 17%      | 16%       | 10%       | 15%       | 29%      | 19%       | 34%       | 46%       |
| TripAdvisor or similar site with user-generated content                    | 15% | 16%       | 3%    | 7%        | 18%   | 32%       | 2%     | 9%        | 12%       | 13%       | 22%      | 25%       | 17%       | 19%       | 24%      | 19%       | 25%       | 23%       |
| Personal blog  | 14% | 15%       | 16%   | 15%       | 12%   | 14%       | 15%    | 19%       | 10%       | 16%       | 18%      | 15%       | 3%        | 9%        | 20%      | 8%        | 22%       | 14%       |
| Social network, Twitter  | 11% | 15%       | 7%    | 8%        | 24%   | 35%       | 2%     | 5%        | 9%        | 23%       | 3%       | 11%       | 4%        | 5%        | 11%      | 5%        | 27%       | 40%       |
| Family or friends in Japan   | 12% | 14%       | 10%   | 16%       | 13%   | 19%       | 6%     | 11%       | 3%        | 8%        | 9%       | 24%       | 18%       | 13%       | 17%      | 22%       | 27%       | 29%       |
| Employees of local   | 13% | 13%       | 7%    | 8%        | 19%   | 28%       | 4%     | 12%       | 5%        | 8%        | 18%      | 18%       | 8%        | 8%        | 23%      | 11%       | 20%       | 20%       |
| Official website of local government, tourism bureau, etc.                 | 11% | 14%       | 3%    | 6%        | 11%   | 25%       | 3%     | 6%        | 15%       | 19%       | 8%       | 15%       | 7%        | 15%       | 20%      | 16%       | 34%       | 29%       |
| Station employees, police box officers                                     | 10% | 12%       | 4%    | 6%        | 8%    | 16%       | 4%     | 6%        | 8%        | 15%       | 10%      | 7%        | 16%       | 22%       | 24%      | 22%       | 24%       | 29%       |
| Passersby on street  | 11% | 11%       | 8%    | 10%       | 8%    | 13%       | 5%     | 8%        | 9%        | 11%       | 14%      | 12%       | 13%       | 15%       | 23%      | 24%       | 15%       | 11%       |
| Other  | 0%  | 1%        | 0%    | 1%        | 1%    | 0%        | 0%     | 1%        | 0%        | 0%        | 1%       | 1%        | 1%        | 3%        | 1%       | 0%        | 0%        | 0%        |
| Didn't gather information in Japan   | 13% | 10%       | 19%   | 13%       | 11%   | 5%        | 18%    | 15%       | 24%       | 7%        | 7%       | 3%        | 17%       | 13%       | 1%       | 8%        | 3%        | 0%        |

Notes: 1 This question was directed at respondents who had been to Japan in the past, and asked about their sources of information on Japan during their most recent trip.

2 The top 5 items are indicated in red or yellow.

11. **Previous visitors to Japan** “Which aspects of your trip did you decide after arrival? Which did you perceive as expensive?”

◆ **Relatively large percentage of travelers decided where to eat, where to shop after arrival.**

- While many visitors decide all aspects of their trip before setting out for Japan, a relatively large proportion wait until arrival to choose dining spots and shopping locations. Dining and shopping promotions aimed at such travelers could prove effective.
- Travelers noted the high cost of dining, lodgings, and transportation in Japan. The expense involved in getting around Japan was particularly felt by respondents who enjoy traveling without a guide, such as those from Malaysia and Hong Kong.

Matters decided after arrival in Japan (excluding visitors who had no free activity days) (Multiple responses)

| Respondents→<br>Visits to Japan→            | All |           | Korea |           | China |           | Taiwan |           | Hong Kong |           | Thailand |           | Singapore |           | Malaysia |           | Indonesia |           |
|---|-----|-----------|-------|-----------|-------|-----------|--------|-----------|-----------|-----------|----------|-----------|-----------|-----------|----------|-----------|-----------|-----------|
|   | 1   | 2 or more | 1     | 2 or more | 1     | 2 or more | 1      | 2 or more | 1         | 2 or more | 1        | 2 or more | 1         | 2 or more | 1        | 2 or more | 1         | 2 or more |
| Sample size                                 | 472 | 626       | 64    | 100       | 92    | 62        | 48     | 127       | 71        | 193       | 63       | 58        | 64        | 54        | 43       | 18        | 27        | 14        |
| Restaurants, other eating places            | 42% | 51%       | 45%   | 52%       | 57%   | 65%       | 23%    | 49%       | 39%       | 51%       | 41%      | 48%       | 36%       | 44%       | 44%      | 44%       | 37%       | 50%       |
| Shopping destinations                       | 34% | 42%       | 33%   | 41%       | 43%   | 56%       | 17%    | 37%       | 38%       | 41%       | 32%      | 41%       | 31%       | 37%       | 42%      | 44%       | 30%       | 43%       |
| Specific sites                              | 24% | 26%       | 20%   | 15%       | 24%   | 37%       | 21%    | 22%       | 27%       | 27%       | 29%      | 31%       | 22%       | 28%       | 26%      | 33%       | 26%       | 43%       |
| Sightseeing areas                           | 25% | 24%       | 28%   | 22%       | 18%   | 27%       | 15%    | 13%       | 21%       | 25%       | 22%      | 31%       | 33%       | 28%       | 42%      | 56%       | 22%       | 29%       |
| Optional tours                              | 16% | 15%       | 5%    | 8%        | 32%   | 42%       | 6%     | 16%       | 10%       | 8%        | 6%       | 12%       | 17%       | 19%       | 30%      | 39%       | 26%       | 14%       |
| Lodgings                                    | 10% | 12%       | 9%    | 13%       | 12%   | 21%       | 0%     | 2%        | 8%        | 8%        | 11%      | 16%       | 14%       | 11%       | 12%      | 28%       | 11%       | 50%       |
| Other                                       | 1%  | 0%        | 0%    | 0%        | 0%    | 0%        | 0%     | 0%        | 0%        | 0%        | 3%       | 0%        | 2%        | 2%        | 5%       | 0%        | 4%        | 0%        |
| Decided everything before arriving in Japan | 35% | 31%       | 28%   | 29%       | 21%   | 6%        | 58%    | 36%       | 48%       | 36%       | 33%      | 24%       | 41%       | 39%       | 33%      | 22%       | 26%       | 29%       |

Things perceived as expensive in Japan (Multiple responses)

| Respondents<br>Visits to Japan                                 | All |           | Korea |           | China |           | Taiwan |           | Hong Kong |           | Thailand |           | Singapore |           | Malaysia |           | Indonesia |           |
|--|-----|-----------|-------|-----------|-------|-----------|--------|-----------|-----------|-----------|----------|-----------|-----------|-----------|----------|-----------|-----------|-----------|
|  | 1   | 2 or more | 1     | 2 or more | 1     | 2 or more | 1      | 2 or more | 1         | 2 or more | 1        | 2 or more | 1         | 2 or more | 1        | 2 or more | 1         | 2 or more |
| Sample size  | 851 | 1016      | 112   | 165       | 170   | 110       | 114    | 230       | 105       | 253       | 125      | 100       | 96        | 86        | 70       | 37        | 59        | 35        |
| Food and drink   | 50% | 44%       | 46%   | 46%       | 47%   | 39%       | 46%    | 47%       | 42%       | 34%       | 54%      | 50%       | 54%       | 52%       | 67%      | 57%       | 47%       | 40%       |
| Lodging  | 39% | 39%       | 25%   | 25%       | 34%   | 38%       | 36%    | 38%       | 36%       | 38%       | 52%      | 56%       | 39%       | 48%       | 53%      | 51%       | 44%       | 37%       |
| Transportation in Japan  | 32% | 42%       | 29%   | 45%       | 21%   | 20%       | 19%    | 35%       | 41%       | 55%       | 34%      | 40%       | 44%       | 40%       | 41%      | 65%       | 37%       | 29%       |
| Shopping   | 36% | 32%       | 26%   | 33%       | 32%   | 30%       | 32%    | 30%       | 33%       | 24%       | 38%      | 41%       | 47%       | 42%       | 53%      | 35%       | 44%       | 51%       |
| Entrance and usage fees for tourism facilities and theme parks | 24% | 31%       | 19%   | 33%       | 14%   | 30%       | 29%    | 32%       | 20%       | 31%       | 31%      | 29%       | 22%       | 26%       | 36%      | 24%       | 41%       | 34%       |
| Roundtrip airfare  | 21% | 21%       | 9%    | 12%       | 14%   | 24%       | 25%    | 19%       | 10%       | 19%       | 34%      | 34%       | 20%       | 23%       | 29%      | 27%       | 41%       | 37%       |
| Taxes  | 12% | 15%       | 3%    | 7%        | 9%    | 16%       | 13%    | 10%       | 16%       | 21%       | 16%      | 14%       | 9%        | 19%       | 13%      | 19%       | 17%       | 23%       |
| Don't know cost breakdown because trip was a tour or package   | 13% | 10%       | 14%   | 8%        | 12%   | 5%        | 25%    | 19%       | 11%       | 9%        | 10%      | 3%        | 8%        | 7%        | 11%      | 8%        | 10%       | 6%        |
| Passport and visa costs  | 11% | 9%        | 1%    | 2%        | 17%   | 18%       | 9%     | 5%        | 7%        | 7%        | 13%      | 15%       | 3%        | 5%        | 16%      | 8%        | 25%       | 37%       |
| Other  | 0%  | 0%        | 1%    | 1%        | 0%    | 0%        | 0%     | 0%        | 1%        | 0%        | 0%       | 0%        | 1%        | 1%        | 0%       | 0%        | 0%        | 0%        |
| Nothing in particular  | 5%  | 4%        | 8%    | 7%        | 9%    | 7%        | 6%     | 4%        | 3%        | 2%        | 0%       | 1%        | 6%        | 7%        | 3%       | 5%        | 3%        | 3%        |

Notes: 1 The questions on this page were directed at respondents who had been to Japan in the past, and asked what matter they decided after arrival on their most recent trip.

2 Ranking is indicated by a color scale: : Lowest ←→ Highest



◆ **Ease of changing money, paying by credit card, and utilizing tax exemptions offers potential means of boosting domestic consumption.**

Shopping spots in Japan

(Multiple responses)

| Respondents                                       | All |           | Korea |           | China |           | Taiwan |           | Hong Kong |           | Thailand |           | Singapore |           | Malaysia |           | Indonesia |           |
|---|-----|-----------|-------|-----------|-------|-----------|--------|-----------|-----------|-----------|----------|-----------|-----------|-----------|----------|-----------|-----------|-----------|
|   | 1   | 2 or more | 1     | 2 or more | 1     | 2 or more | 1      | 2 or more | 1         | 2 or more | 1        | 2 or more | 1         | 2 or more | 1        | 2 or more | 1         | 2 or more |
| Sample size                                       | 851 | 1016      | 112   | 165       | 170   | 110       | 114    | 230       | 105       | 253       | 125      | 100       | 96        | 86        | 70       | 37        | 59        | 35        |
| Shopping malls                                    | 53% | 56%       | 30%   | 37%       | 62%   | 70%       | 37%    | 45%       | 65%       | 72%       | 48%      | 38%       | 74%       | 70%       | 60%      | 65%       | 51%       | 60%       |
| Souvenir shops in tourist areas                   | 53% | 56%       | 51%   | 45%       | 46%   | 50%       | 49%    | 58%       | 47%       | 61%       | 63%      | 65%       | 46%       | 38%       | 51%      | 62%       | 85%       | 83%       |
| Department stores                                 | 45% | 55%       | 22%   | 33%       | 44%   | 42%       | 31%    | 48%       | 65%       | 77%       | 52%      | 58%       | 56%       | 69%       | 50%      | 65%       | 41%       | 29%       |
| Supermarkets                                      | 43% | 56%       | 21%   | 31%       | 36%   | 35%       | 37%    | 58%       | 63%       | 80%       | 39%      | 48%       | 64%       | 60%       | 49%      | 59%       | 47%       | 54%       |
| Convenience stores                                | 42% | 53%       | 41%   | 42%       | 28%   | 28%       | 49%    | 56%       | 53%       | 76%       | 42%      | 50%       | 46%       | 43%       | 51%      | 54%       | 41%       | 40%       |
| Airport shops                                     | 42% | 54%       | 40%   | 56%       | 46%   | 49%       | 42%    | 55%       | 34%       | 57%       | 49%      | 48%       | 45%       | 59%       | 39%      | 54%       | 29%       | 29%       |
| 100-yen shops                                     | 35% | 45%       | 30%   | 44%       | 14%   | 21%       | 22%    | 28%       | 36%       | 66%       | 54%      | 56%       | 44%       | 43%       | 44%      | 57%       | 54%       | 43%       |
| Large discount stores                             | 34% | 38%       | 19%   | 36%       | 41%   | 44%       | 21%    | 30%       | 30%       | 42%       | 46%      | 38%       | 26%       | 34%       | 44%      | 46%       | 44%       | 49%       |
| Drug stores                                       | 24% | 44%       | 18%   | 25%       | 28%   | 31%       | 45%    | 68%       | 41%       | 68%       | 14%      | 15%       | 11%       | 23%       | 13%      | 16%       | 10%       | 11%       |
| Specialty shops (accessory shops, jewelers, etc.) | 32% | 34%       | 12%   | 16%       | 44%   | 61%       | 19%    | 24%       | 24%       | 38%       | 44%      | 46%       | 30%       | 26%       | 41%      | 46%       | 42%       | 37%       |
| Volume retailers of home electric appliances      | 20% | 23%       | 5%    | 12%       | 27%   | 27%       | 11%    | 22%       | 10%       | 21%       | 29%      | 24%       | 20%       | 28%       | 27%      | 35%       | 41%       | 46%       |
| Shops in hotels, inns or other lodging places     | 17% | 25%       | 15%   | 17%       | 15%   | 33%       | 19%    | 23%       | 24%       | 32%       | 14%      | 22%       | 15%       | 8%        | 13%      | 30%       | 22%       | 40%       |
| Other   | 1%  | 0%        | 2%    | 0%        | 0%    | 0%        | 4%     | 0%        | 0%        | 0%        | 1%       | 1%        | 2%        | 0%        | 0%       | 0%        | 0%        | 0%        |

If there were more places in Japan to change money, use credit cards and cash cards...

(Single response)

| Respondents                        | All |           | Korea |           | China |           | Taiwan |           | Hong Kong |           | Thailand |           | Singapore |           | Malaysia |           | Indonesia |           |
|------------------------------------|-----|-----------|-------|-----------|-------|-----------|--------|-----------|-----------|-----------|----------|-----------|-----------|-----------|----------|-----------|-----------|-----------|
|                                    | 1   | 2 or more | 1     | 2 or more | 1     | 2 or more | 1      | 2 or more | 1         | 2 or more | 1        | 2 or more | 1         | 2 or more | 1        | 2 or more | 1         | 2 or more |
| Sample size                        | 851 | 1016      | 112   | 165       | 170   | 110       | 114    | 230       | 105       | 253       | 125      | 100       | 96        | 86        | 70       | 37        | 59        | 35        |
| I would have spent more            | 27% | 29%       | 13%   | 12%       | 36%   | 46%       | 27%    | 29%       | 19%       | 26%       | 45%      | 41%       | 18%       | 23%       | 24%      | 43%       | 22%       | 40%       |
| I probably would have spent more   | 39% | 36%       | 27%   | 33%       | 51%   | 43%       | 28%    | 30%       | 33%       | 38%       | 46%      | 48%       | 33%       | 35%       | 46%      | 30%       | 54%       | 34%       |
| I would have spent the same amount | 28% | 31%       | 52%   | 50%       | 11%   | 10%       | 40%    | 38%       | 36%       | 31%       | 7%       | 9%        | 45%       | 36%       | 19%      | 16%       | 22%       | 26%       |
| Don't know                         | 5%  | 4%        | 8%    | 5%        | 2%    | 1%        | 4%     | 3%        | 11%       | 5%        | 2%       | 2%        | 4%        | 6%        | 11%      | 11%       | 2%        | 0%        |

If Japan's tax exemption system were clearer and easier to use...

(Single response)

| Respondents→                        | All |           | Korea |           | China |           | Taiwan |           | Hong Kong |           | Thailand |           | Singapore |           | Malaysia |           | Indonesia |           |
|-------------------------------------|-----|-----------|-------|-----------|-------|-----------|--------|-----------|-----------|-----------|----------|-----------|-----------|-----------|----------|-----------|-----------|-----------|
|                                     | 1   | 2 or more | 1     | 2 or more | 1     | 2 or more | 1      | 2 or more | 1         | 2 or more | 1        | 2 or more | 1         | 2 or more | 1        | 2 or more | 1         | 2 or more |
| Sample size                         | 851 | 1016      | 112   | 165       | 170   | 110       | 114    | 230       | 105       | 253       | 125      | 100       | 96        | 86        | 70       | 37        | 59        | 35        |
| I would have bought more            | 34% | 37%       | 17%   | 17%       | 46%   | 58%       | 32%    | 40%       | 25%       | 34%       | 54%      | 49%       | 21%       | 27%       | 34%      | 46%       | 34%       | 46%       |
| I probably would have bought more   | 41% | 42%       | 37%   | 48%       | 48%   | 35%       | 35%    | 42%       | 42%       | 45%       | 39%      | 47%       | 39%       | 31%       | 43%      | 30%       | 46%       | 29%       |
| I would have bought the same amount | 20% | 18%       | 39%   | 31%       | 4%    | 5%        | 28%    | 17%       | 28%       | 16%       | 5%       | 3%        | 31%       | 34%       | 11%      | 14%       | 17%       | 26%       |
| Don't know                          | 5%  | 3%        | 7%    | 4%        | 1%    | 1%        | 4%     | 1%        | 6%        | 5%        | 2%       | 1%        | 9%        | 8%        | 11%      | 11%       | 3%        | 0%        |

Notes: 1 The questions on this page were directed at respondents who had been to Japan in the past, and asked about their shopping experience on their most recent trip.

2 Ranking is indicated by a color scale: Lowest  $\longleftrightarrow$  Highest

**Previous visitors to Japan**

13. "Which parts of your trip to Japan satisfied you the most?"

**◆ Japanese food, nature and scenery, hot springs, and other attractions cited as reasons for coming to Japan, were also rated the most satisfying.**

- Japan’s cuisine, its nature and scenery, and its hot springs, which respondents to Question 9 mentioned as reasons for visiting Japan, appeared to meet travelers’ expectations as they also drew high ratings for satisfaction.
- Reactions varied according to nationality. Respondents from China and Malaysia expressed greatest satisfaction with “shopping” those from Indonesia with “staying in a traditional inn (ryokan)” and “buying goods related to anime and other aspects of pop culture.”

(Up to 5 items each)

| Satisfying aspects / Respondents-                              | All |           | Korea |           | China |           | Taiwan |           | Hong Kong |           | Thailand |           | Singapore |           | Malaysia |           | Indonesia |           |
|--|-----|-----------|-------|-----------|-------|-----------|--------|-----------|-----------|-----------|----------|-----------|-----------|-----------|----------|-----------|-----------|-----------|
|  | 1   | 2 or more | 1     | 2 or more | 1     | 2 or more | 1      | 2 or more | 1         | 2 or more | 1        | 2 or more | 1         | 2 or more | 1        | 2 or more | 1         | 2 or more |
| Sample size  | 851 | 1016      | 112   | 165       | 170   | 110       | 114    | 230       | 105       | 253       | 125      | 100       | 96        | 86        | 70       | 37        | 59        | 35        |
| Japanese food  | 47% | 46%       | 55%   | 54%       | 44%   | 38%       | 45%    | 40%       | 53%       | 50%       | 26%      | 24%       | 60%       | 65%       | 50%      | 59%       | 53%       | 40%       |
| Nature and scenery   | 36% | 32%       | 36%   | 38%       | 41%   | 31%       | 37%    | 33%       | 28%       | 32%       | 38%      | 29%       | 40%       | 35%       | 31%      | 22%       | 29%       | 26%       |
| Bathing in hot springs   | 28% | 33%       | 35%   | 37%       | 38%   | 33%       | 21%    | 34%       | 35%       | 36%       | 29%      | 29%       | 24%       | 31%       | 14%      | 22%       | 8%        | 17%       |
| Enjoying favorite foods  | 21% | 25%       | 13%   | 15%       | 25%   | 26%       | 25%    | 33%       | 33%       | 36%       | 28%      | 23%       | 14%       | 13%       | 11%      | 11%       | 3%        | 6%        |
| Clean, reasonably priced lodgings                              | 24% | 20%       | 33%   | 30%       | 11%   | 11%       | 17%    | 17%       | 17%       | 19%       | 33%      | 18%       | 28%       | 12%       | 33%      | 30%       | 31%       | 31%       |
| High level of public safety                                    | 19% | 21%       | 19%   | 16%       | 15%   | 12%       | 24%    | 27%       | 15%       | 26%       | 15%      | 12%       | 24%       | 20%       | 27%      | 32%       | 14%       | 11%       |
| Overall cleanliness  | 18% | 20%       | 22%   | 22%       | 14%   | 9%        | 27%    | 24%       | 24%       | 29%       | 7%       | 11%       | 22%       | 10%       | 16%      | 14%       | 12%       | 3%        |
| Historic landmarks and famous buildings                        | 20% | 16%       | 34%   | 21%       | 20%   | 15%       | 27%    | 20%       | 16%       | 12%       | 10%      | 16%       | 17%       | 9%        | 13%      | 11%       | 15%       | 9%        |
| Good, inexpensive food   | 17% | 18%       | 20%   | 22%       | 8%    | 7%        | 12%    | 20%       | 15%       | 10%       | 29%      | 30%       | 14%       | 28%       | 20%      | 16%       | 22%       | 14%       |
| Cherry-blossom viewing   | 15% | 18%       | 3%    | 5%        | 22%   | 26%       | 10%    | 15%       | 10%       | 17%       | 20%      | 30%       | 13%       | 22%       | 19%      | 24%       | 27%       | 29%       |
| Shopping for clothes and other goods                           | 16% | 15%       | 9%    | 20%       | 22%   | 16%       | 9%     | 9%        | 19%       | 17%       | 17%      | 15%       | 14%       | 19%       | 24%      | 11%       | 7%        | 11%       |
| Shopping for food and beverages                                | 14% | 15%       | 14%   | 19%       | 9%    | 10%       | 18%    | 14%       | 17%       | 18%       | 16%      | 14%       | 15%       | 15%       | 13%      | 14%       | 3%        | 3%        |
| Staying in a traditional inn (ryokan)                          | 15% | 13%       | 13%   | 10%       | 13%   | 15%       | 11%    | 11%       | 17%       | 8%        | 10%      | 20%       | 21%       | 22%       | 19%      | 16%       | 31%       | 31%       |
| Amusement parks; theme parks                                   | 14% | 12%       | 14%   | 8%        | 12%   | 11%       | 22%    | 14%       | 15%       | 17%       | 13%      | 7%        | 14%       | 8%        | 14%      | 19%       | 10%       | 9%        |
| Riding railroads   | 10% | 11%       | 3%    | 5%        | 12%   | 8%        | 7%     | 7%        | 5%        | 15%       | 23%      | 19%       | 8%        | 8%        | 7%       | 11%       | 17%       | 17%       |
| Snowy landscapes   | 10% | 11%       | 4%    | 4%        | 6%    | 6%        | 4%     | 17%       | 11%       | 11%       | 16%      | 9%        | 15%       | 15%       | 17%      | 5%        | 8%        | 9%        |
| Rest and relaxation  | 10% | 10%       | 4%    | 7%        | 4%    | 5%        | 25%    | 13%       | 12%       | 11%       | 9%       | 6%        | 15%       | 14%       | 4%       | 3%        | 7%        | 11%       |
| Visiting World Heritage Sites                                  | 9%  | 10%       | 4%    | 10%       | 9%    | 8%        | 8%     | 11%       | 9%        | 9%        | 12%      | 9%        | 9%        | 9%        | 10%      | 14%       | 8%        | 11%       |
| Convenient, easy-to-use public transport                       | 8%  | 9%        | 6%    | 6%        | 7%    | 2%        | 12%    | 15%       | 9%        | 8%        | 5%       | 11%       | 5%        | 10%       | 7%       | 5%        | 10%       | 3%        |
| Japanese sake  | 8%  | 7%        | 12%   | 11%       | 14%   | 13%       | 3%     | 4%        | 6%        | 3%        | 6%       | 9%        | 5%        | 12%       | 9%       | 5%        | 12%       | 11%       |
| Staying in comfort in luxury hotels                            | 8%  | 7%        | 1%    | 4%        | 10%   | 16%       | 16%    | 9%        | 17%       | 5%        | 2%       | 6%        | 7%        | 6%        | 1%       | 5%        | 5%        | 11%       |
| Buying goods related to anime and other aspects of pop culture | 9%  | 6%        | 6%    | 6%        | 5%    | 5%        | 8%     | 7%        | 6%        | 3%        | 10%      | 9%        | 8%        | 5%        | 6%       | 11%       | 29%       | 26%       |

Notes: 1 This question was directed at respondents who had been to Japan in the past, and asked about the most satisfying aspects of their trip. Listed here are the top 22 of a total of 68 choices.

2 The top 5 items are indicated in red or yellow.



Previous visitors  
to Japan

14. “Which parts of your trip to Japan satisfied you the least?”

◆ **Greatest dissatisfaction found with “travel environment”: language issues, costs, and communication.**

- Respondents were unhappy with many of the elements needed to create a pleasant environment for travel, such as language, costs, and communication. Visitors from China, for whom shopping is an important part of a visit to Japan, had many complaints in regard to currency exchange.
- Dissatisfaction among travelers from Thailand, Indonesia and Malaysia tended to center on content: gambling, nightlife, Japanese saké, sports, and so on.

(Up to 5 items each)

| Cause of dissatisfaction /<br>Number of visits to Japan                            | All |           | Korea |           | China |           | Taiwan |           | Hong Kong |           | Thailand |           | Singapore |           | Malaysia |           | Indonesia |           |
|--|-----|-----------|-------|-----------|-------|-----------|--------|-----------|-----------|-----------|----------|-----------|-----------|-----------|----------|-----------|-----------|-----------|
|  | 1   | 2 or more | 1     | 2 or more | 1     | 2 or more | 1      | 2 or more | 1         | 2 or more | 1        | 2 or more | 1         | 2 or more | 1        | 2 or more | 1         | 2 or more |
| Sample size  | 846 | 1014      | 112   | 165       | 169   | 110       | 114    | 230       | 105       | 253       | 124      | 99        | 96        | 85        | 69       | 37        | 57        | 35        |
| Understanding of English   | 24% | 28%       | 26%   | 24%       | 18%   | 15%       | 24%    | 33%       | 33%       | 38%       | 14%      | 16%       | 39%       | 34%       | 20%      | 32%       | 18%       | 0%        |
| Understanding of own language  | 24% | 25%       | 21%   | 24%       | 30%   | 19%       | 25%    | 26%       | 32%       | 31%       | 16%      | 16%       | 27%       | 27%       | 25%      | 30%       | 11%       | 3%        |
| Travel costs   | 22% | 25%       | 31%   | 28%       | 28%   | 15%       | 24%    | 30%       | 17%       | 28%       | 15%      | 11%       | 28%       | 29%       | 16%      | 24%       | 9%        | 9%        |
| Gambling or show experience  | 14% | 16%       | 7%    | 9%        | 14%   | 15%       | 13%    | 16%       | 10%       | 14%       | 19%      | 35%       | 17%       | 15%       | 14%      | 11%       | 18%       | 26%       |
| Experience with night life (bars, clubs, night markets, etc.)                      | 15% | 14%       | 13%   | 11%       | 8%    | 8%        | 19%    | 19%       | 13%       | 13%       | 23%      | 21%       | 15%       | 9%        | 17%      | 8%        | 18%       | 23%       |
| Ease of using mobile phones and other communication devices (WiFi reception, etc.) | 12% | 14%       | 10%   | 13%       | 14%   | 12%       | 20%    | 19%       | 11%       | 15%       | 5%       | 6%        | 16%       | 14%       | 9%       | 8%        | 4%        | 9%        |
| Shopping for famous-brand goods or jewelry   | 13% | 13%       | 14%   | 13%       | 7%    | 4%        | 22%    | 16%       | 7%        | 11%       | 19%      | 14%       | 11%       | 16%       | 12%      | 8%        | 12%       | 17%       |
| Changing money   | 11% | 13%       | 7%    | 10%       | 17%   | 10%       | 18%    | 16%       | 10%       | 17%       | 6%       | 7%        | 10%       | 13%       | 7%       | 14%       | 9%        | 3%        |
| Tax-exemption system   | 10% | 14%       | 5%    | 8%        | 16%   | 11%       | 17%    | 19%       | 11%       | 21%       | 6%       | 8%        | 7%        | 4%        | 6%       | 11%       | 7%        | 3%        |
| Interacting with Japanese people   | 13% | 9%        | 19%   | 14%       | 24%   | 13%       | 14%    | 7%        | 12%       | 10%       | 6%       | 7%        | 7%        | 6%        | 9%       | 5%        | 2%        | 9%        |
| Japanese sake  | 12% | 10%       | 12%   | 11%       | 8%    | 6%        | 6%     | 9%        | 10%       | 11%       | 19%      | 11%       | 10%       | 11%       | 13%      | 8%        | 23%       | 23%       |
| Absorbing language or specialized knowledge  | 10% | 10%       | 11%   | 11%       | 11%   | 17%       | 8%     | 6%        | 9%        | 12%       | 7%       | 8%        | 13%       | 9%        | 16%      | 16%       | 11%       | 6%        |
| Staying at luxury hotels   | 12% | 9%        | 13%   | 12%       | 8%    | 5%        | 9%     | 7%        | 4%        | 3%        | 21%      | 19%       | 10%       | 12%       | 13%      | 22%       | 21%       | 14%       |
| Price and taste of food  | 11% | 9%        | 21%   | 15%       | 13%   | 16%       | 9%     | 10%       | 12%       | 6%        | 9%       | 3%        | 7%        | 9%        | 6%       | 3%        | 7%        | 6%        |
| Watching domestic professional sports  | 9%  | 11%       | 4%    | 5%        | 9%    | 10%       | 9%     | 14%       | 12%       | 13%       | 12%      | 9%        | 7%        | 12%       | 10%      | 3%        | 5%        | 9%        |
| Watching traditional sports (sumo, kendo, judo, etc.)                              | 10% | 10%       | 13%   | 7%        | 11%   | 14%       | 11%    | 13%       | 10%       | 10%       | 7%       | 8%        | 8%        | 5%        | 9%       | 5%        | 7%        | 9%        |
| Marine sports  | 9%  | 10%       | 6%    | 7%        | 7%    | 12%       | 11%    | 8%        | 11%       | 12%       | 9%       | 11%       | 5%        | 8%        | 7%       | 11%       | 16%       | 14%       |
| Watching international sports events   | 9%  | 10%       | 2%    | 4%        | 9%    | 6%        | 10%    | 11%       | 13%       | 13%       | 9%       | 14%       | 5%        | 8%        | 9%       | 8%        | 14%       | 9%        |
| Shopping for home electrical appliances and audio-visual goods                     | 9%  | 9%        | 6%    | 10%       | 8%    | 6%        | 13%    | 8%        | 10%       | 7%        | 10%      | 12%       | 4%        | 13%       | 10%      | 14%       | 11%       | 9%        |
| Shopping for books or DVDs   | 10% | 8%        | 3%    | 7%        | 9%    | 10%       | 6%     | 4%        | 10%       | 10%       | 12%      | 8%        | 7%        | 13%       | 20%      | 16%       | 21%       | 3%        |
| Tennis, golf, other sports   | 9%  | 8%        | 3%    | 4%        | 7%    | 7%        | 11%    | 8%        | 11%       | 12%       | 9%       | 7%        | 7%        | 7%        | 19%      | 5%        | 18%       | 11%       |
| Winter sports  | 9%  | 9%        | 2%    | 1%        | 12%   | 15%       | 12%    | 5%        | 10%       | 11%       | 7%       | 15%       | 6%        | 4%        | 4%       | 16%       | 12%       | 17%       |

Notes: 1 This question was directed at respondents who had been to Japan in the past, and asked about the least satisfying aspects of their trip. Listed here are the top 22 of a total of 68 choices.

2 The top 5 items are indicated in red or yellow.

**◆ Hot springs, Mt. Fuji, traditional streetscapes, cherry blossoms, and Japanese inns: Travelers strongly drawn to Japan's native scenery.**

- As in the previous two surveys, respondents showed greater interest in Japan's native scenery, than in shopping, urban landscapes, infrastructure or factories.\*
- Seasonal attractions such as cherry blossoms, snowy landscapes, and autumn leaves were highly popular among respondents from Thailand, Singapore, Malaysia and elsewhere in Southeast Asia. Urban landscapes, dams and factories were of considerable interest to respondents from Malaysia and Indonesia.

\* Numbers in parentheses are percentages for those who expressed a desire to travel to Japan in Question 2 (Travel preferences by country/region).

**1. Hot springs**


|                 |                  |                  |                  |
|-----------------|------------------|------------------|------------------|
| <b>All</b>      |                  |                  |                  |
| 68% (73%)       |                  |                  |                  |
| <b>Korea</b>    | <b>China</b>     | <b>Hong Kong</b> | <b>Taiwan</b>    |
| 67% (71%)       | 63% (65%)        | 65% (69%)        | 69% (73%)        |
| <b>Thailand</b> | <b>Singapore</b> | <b>Malaysia</b>  | <b>Indonesia</b> |
| 73% (77%)       | 74% (80%)        | 73% (81%)        | 59% (66%)        |

**2. Mt. Fuji**


|                 |                  |                  |                  |
|-----------------|------------------|------------------|------------------|
| <b>All</b>      |                  |                  |                  |
| 67% (73%)       |                  |                  |                  |
| <b>Korea</b>    | <b>China</b>     | <b>Hong Kong</b> | <b>Taiwan</b>    |
| 48% (55%)       | 72% (77%)        | 60% (66%)        | 61% (65%)        |
| <b>Thailand</b> | <b>Singapore</b> | <b>Malaysia</b>  | <b>Indonesia</b> |
| 73% (77%)       | 71% (77%)        | 77% (84%)        | 74% (77%)        |

**3. Traditional streetscapes**

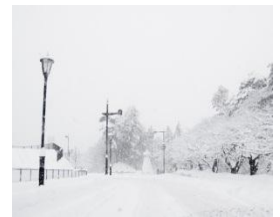

|                 |                  |                  |                  |
|-----------------|------------------|------------------|------------------|
| <b>All</b>      |                  |                  |                  |
| 66% (74%)       |                  |                  |                  |
| <b>Korea</b>    | <b>China</b>     | <b>Hong Kong</b> | <b>Taiwan</b>    |
| 56% (76%)       | 55% (57%)        | 72% (78%)        | 67% (71%)        |
| <b>Thailand</b> | <b>Singapore</b> | <b>Malaysia</b>  | <b>Indonesia</b> |
| 68% (77%)       | 70% (80%)        | 74% (81%)        | 64% (74%)        |

**4. Cherry blossoms**


|                 |                  |                  |                  |
|-----------------|------------------|------------------|------------------|
| <b>All</b>      |                  |                  |                  |
| 66% (73%)       |                  |                  |                  |
| <b>Korea</b>    | <b>China</b>     | <b>Hong Kong</b> | <b>Taiwan</b>    |
| 32% (41%)       | 63% (66%)        | 58% (64%)        | 65% (68%)        |
| <b>Thailand</b> | <b>Singapore</b> | <b>Malaysia</b>  | <b>Indonesia</b> |
| 74% (79%)       | 72% (78%)        | 83% (88%)        | 78% (86%)        |

**5. Traditional inns**


|                 |                  |                  |                  |
|-----------------|------------------|------------------|------------------|
| <b>All</b>      |                  |                  |                  |
| 59% (66%)       |                  |                  |                  |
| <b>Korea</b>    | <b>China</b>     | <b>Hong Kong</b> | <b>Taiwan</b>    |
| 49% (63%)       | 52% (55%)        | 60% (64%)        | 59% (62%)        |
| <b>Thailand</b> | <b>Singapore</b> | <b>Malaysia</b>  | <b>Indonesia</b> |
| 59% (64%)       | 64% (72%)        | 65% (71%)        | 69% (78%)        |

**6. Snowy landscapes**


|                 |                  |                  |                  |
|-----------------|------------------|------------------|------------------|
| <b>All</b>      |                  |                  |                  |
| 57% (63%)       |                  |                  |                  |
| <b>Korea</b>    | <b>China</b>     | <b>Hong Kong</b> | <b>Taiwan</b>    |
| 46% (55%)       | 41% (43%)        | 52% (58%)        | 59% (64%)        |
| <b>Thailand</b> | <b>Singapore</b> | <b>Malaysia</b>  | <b>Indonesia</b> |
| 59% (63%)       | 60% (68%)        | 73% (78%)        | 63% (71%)        |

**7. Bullet train**


|                 |                  |                  |                  |
|-----------------|------------------|------------------|------------------|
| <b>All</b>      |                  |                  |                  |
| 55% (63%)       |                  |                  |                  |
| <b>Korea</b>    | <b>China</b>     | <b>Hong Kong</b> | <b>Taiwan</b>    |
| 34% (48%)       | 41% (45%)        | 54% (60%)        | 48% (51%)        |
| <b>Thailand</b> | <b>Singapore</b> | <b>Malaysia</b>  | <b>Indonesia</b> |
| 60% (66%)       | 62% (68%)        | 73% (79%)        | 72% (80%)        |

**8. Castles**


|                 |                  |                  |                  |
|-----------------|------------------|------------------|------------------|
| <b>All</b>      |                  |                  |                  |
| 53% (61%)       |                  |                  |                  |
| <b>Korea</b>    | <b>China</b>     | <b>Hong Kong</b> | <b>Taiwan</b>    |
| 38% (51%)       | 41% (43%)        | 58% (62%)        | 52% (56%)        |
| <b>Thailand</b> | <b>Singapore</b> | <b>Malaysia</b>  | <b>Indonesia</b> |
| 63% (69%)       | 58% (66%)        | 67% (75%)        | 49% (58%)        |

**9. Autumn leaves**


|                 |                  |                  |                  |
|-----------------|------------------|------------------|------------------|
| <b>All</b>      |                  |                  |                  |
| 53% (61%)       |                  |                  |                  |
| <b>Korea</b>    | <b>China</b>     | <b>Hong Kong</b> | <b>Taiwan</b>    |
| 17% (23%)       | 37% (38%)        | 45% (50%)        | 62% (66%)        |
| <b>Thailand</b> | <b>Singapore</b> | <b>Malaysia</b>  | <b>Indonesia</b> |
| 61% (70%)       | 66% (73%)        | 76% (80%)        | 63% (71%)        |

**10. Theme parks**


|                 |                  |                  |                  |
|-----------------|------------------|------------------|------------------|
| <b>All</b>      |                  |                  |                  |
| 49% (56%)       |                  |                  |                  |
| <b>Korea</b>    | <b>China</b>     | <b>Hong Kong</b> | <b>Taiwan</b>    |
| 33% (47%)       | 47% (53%)        | 48% (53%)        | 57% (60%)        |
| <b>Thailand</b> | <b>Singapore</b> | <b>Malaysia</b>  | <b>Indonesia</b> |
| 50% (56%)       | 51% (56%)        | 56% (62%)        | 50% (58%)        |

**11. Temples, shrines**


|                 |                  |                  |                  |
|-----------------|------------------|------------------|------------------|
| <b>All</b>      |                  |                  |                  |
| 49% (57%)       |                  |                  |                  |
| <b>Korea</b>    | <b>China</b>     | <b>Hong Kong</b> | <b>Taiwan</b>    |
| 31% (41%)       | 38% (41%)        | 62% (66%)        | 47% (51%)        |
| <b>Thailand</b> | <b>Singapore</b> | <b>Malaysia</b>  | <b>Indonesia</b> |
| 58% (67%)       | 48% (55%)        | 50% (59%)        | 57% (68%)        |

**12. Traditional gardens**


|                 |                  |                  |                  |
|-----------------|------------------|------------------|------------------|
| <b>All</b>      |                  |                  |                  |
| 47% (51%)       |                  |                  |                  |
| <b>Korea</b>    | <b>China</b>     | <b>Hong Kong</b> | <b>Taiwan</b>    |
| 39% (43%)       | 42% (44%)        | 43% (47%)        | 33% (37%)        |
| <b>Thailand</b> | <b>Singapore</b> | <b>Malaysia</b>  | <b>Indonesia</b> |
| 49% (52%)       | 45% (51%)        | 62% (66%)        | 61% (66%)        |

15. **All respondents** Images of Japanese tourist areas: “What would you like to see and do?” (2)

13. Shopping malls



|           |           |           |           |
|-----------|-----------|-----------|-----------|
| All       |           |           |           |
| 45% (51%) |           |           |           |
| Korea     | China     | Hong Kong | Taiwan    |
| 30% (35%) | 52% (58%) | 42% (45%) | 49% (54%) |
| Thailand  | Singapore | Malaysia  | Indonesia |
| 40% (45%) | 51% (59%) | 55% (60%) | 39% (45%) |

14. Department stores (basement food floors)



|           |           |           |           |
|-----------|-----------|-----------|-----------|
| All       |           |           |           |
| 43% (50%) |           |           |           |
| Korea     | China     | Hong Kong | Taiwan    |
| 19% (24%) | 40% (47%) | 43% (47%) | 53% (59%) |
| Thailand  | Singapore | Malaysia  | Indonesia |
| 43% (48%) | 47% (54%) | 53% (58%) | 43% (51%) |

15. Island scenery



|           |           |           |           |
|-----------|-----------|-----------|-----------|
| All       |           |           |           |
| 39% (43%) |           |           |           |
| Korea     | China     | Hong Kong | Taiwan    |
| 21% (24%) | 43% (45%) | 29% (31%) | 30% (33%) |
| Thailand  | Singapore | Malaysia  | Indonesia |
| 42% (46%) | 46% (53%) | 53% (60%) | 44% (49%) |

16. Ocean (resort)



|           |           |           |           |
|-----------|-----------|-----------|-----------|
| All       |           |           |           |
| 36% (40%) |           |           |           |
| Korea     | China     | Hong Kong | Taiwan    |
| 27% (34%) | 42% (46%) | 26% (27%) | 33% (36%) |
| Thailand  | Singapore | Malaysia  | Indonesia |
| 33% (34%) | 42% (46%) | 47% (54%) | 38% (42%) |

17. Ocean (seashore)



|           |           |           |           |
|-----------|-----------|-----------|-----------|
| All       |           |           |           |
| 35% (41%) |           |           |           |
| Korea     | China     | Hong Kong | Taiwan    |
| 22% (34%) | 40% (45%) | 29% (32%) | 31% (33%) |
| Thailand  | Singapore | Malaysia  | Indonesia |
| 30% (33%) | 42% (46%) | 47% (53%) | 42% (49%) |

18. Supermarkets (convenience stores)



|           |           |           |           |
|-----------|-----------|-----------|-----------|
| All       |           |           |           |
| 35% (43%) |           |           |           |
| Korea     | China     | Hong Kong | Taiwan    |
| 14% (27%) | 27% (28%) | 42% (46%) | 54% (60%) |
| Thailand  | Singapore | Malaysia  | Indonesia |
| 28% (30%) | 43% (52%) | 46% (51%) | 27% (33%) |

19. Countryside



|           |           |           |           |
|-----------|-----------|-----------|-----------|
| All       |           |           |           |
| 33% (38%) |           |           |           |
| Korea     | China     | Hong Kong | Taiwan    |
| 12% (16%) | 27% (28%) | 25% (29%) | 34% (36%) |
| Thailand  | Singapore | Malaysia  | Indonesia |
| 30% (32%) | 42% (49%) | 48% (55%) | 44% (51%) |

20. Mountains



|           |           |           |           |
|-----------|-----------|-----------|-----------|
| All       |           |           |           |
| 32% (36%) |           |           |           |
| Korea     | China     | Hong Kong | Taiwan    |
| 9% (13%)  | 22% (23%) | 23% (26%) | 25% (25%) |
| Thailand  | Singapore | Malaysia  | Indonesia |
| 36% (38%) | 50% (58%) | 43% (47%) | 49% (53%) |

21. Urban landscapes (skyscrapers, etc.)



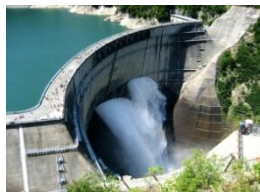
|           |           |           |           |
|-----------|-----------|-----------|-----------|
| All       |           |           |           |
| 26% (32%) |           |           |           |
| Korea     | China     | Hong Kong | Taiwan    |
| 14% (20%) | 30% (34%) | 32% (35%) | 18% (19%) |
| Thailand  | Singapore | Malaysia  | Indonesia |
| 24% (28%) | 21% (27%) | 38% (44%) | 36% (45%) |

22. Luxury hotels



|           |           |           |           |
|-----------|-----------|-----------|-----------|
| All       |           |           |           |
| 25% (29%) |           |           |           |
| Korea     | China     | Hong Kong | Taiwan    |
| 17% (25%) | 27% (36%) | 35% (37%) | 31% (33%) |
| Thailand  | Singapore | Malaysia  | Indonesia |
| 17% (16%) | 28% (33%) | 24% (26%) | 19% (18%) |

23. Dams (large-scale infrastructure)



|           |           |           |           |
|-----------|-----------|-----------|-----------|
| All       |           |           |           |
| 16% (19%) |           |           |           |
| Korea     | China     | Hong Kong | Taiwan    |
| 4% (8%)   | 8% (10%)  | 10% (11%) | 12% (14%) |
| Thailand  | Singapore | Malaysia  | Indonesia |
| 16% (17%) | 21% (21%) | 26% (30%) | 32% (38%) |

24. Factories



|           |           |           |           |
|-----------|-----------|-----------|-----------|
| All       |           |           |           |
| 11% (13%) |           |           |           |
| Korea     | China     | Hong Kong | Taiwan    |
| 2% (4%)   | 7% (8%)   | 8% (10%)  | 9% (9%)   |
| Thailand  | Singapore | Malaysia  | Indonesia |
| 11% (12%) | 11% (14%) | 18% (23%) | 20% (22%) |

25. None of the above

|         |          |           |           |           |
|---------|----------|-----------|-----------|-----------|
| All     | Korea    | China     | Hong Kong | Taiwan    |
| 1% (0%) | 2% (1%)  | 1% (0%)   | 1% (0%)   | 1% (0%)   |
|         | Thailand | Singapore | Malaysia  | Indonesia |
|         | 0% (0%)  | 1% (0%)   | 0% (0%)   | 0% (0%)   |



◆ Broad recognition of “Golden Route” and Hokkaido; desire to visit Hokkaido especially strong

- Findings were roughly the same as in the previous survey in regard to the respondents’ recognition of Japan’s tourist areas and their desire to visit them.
- The choices included a mixture of the names of individual cities and those of wider regions. The regional names of Hokkaido, Shikoku, and Kyushu drew recognition, but for Kansai and Tohoku it was specific cities, such as Kyoto, Osaka and Sendai, that the respondents knew best.
- Hokkaido proved hugely popular, topping the list of desired destinations among respondents from Taiwan, Hong Kong and Singapore.
- Desire to visit Okinawa was strong among the Southeast Asian regions of China, Taiwan and Hong Kong.

(Multiple responses)

| Respondents            | All         |                 | Korea       |                 | China       |                 | Taiwan      |                 | Hong Kong   |                 | Thailand    |                 | Singapore   |                 | Malaysia    |                 | Indonesia   |                 |
|------------------------|-------------|-----------------|-------------|-----------------|-------------|-----------------|-------------|-----------------|-------------|-----------------|-------------|-----------------|-------------|-----------------|-------------|-----------------|-------------|-----------------|
|                        | Recognition | Desire to visit | Recognition | Desire to visit | Recognition | Desire to visit | Recognition | Desire to visit | Recognition | Desire to visit | Recognition | Desire to visit | Recognition | Desire to visit | Recognition | Desire to visit | Recognition | Desire to visit |
| Sample size            | 4000        | 3809            | 500         | 473             | 500         | 495             | 500         | 489             | 500         | 492             | 500         | 482             | 500         | 457             | 500         | 468             | 500         | 453             |
| Tokyo                  | 78%         | 47%             | 75%         | 35%             | 80%         | 53%             | 83%         | 47%             | 85%         | 36%             | 76%         | 50%             | 77%         | 52%             | 76%         | 54%             | 71%         | 51%             |
| Mt. Fuji               | 75%         | 47%             | 64%         | 30%             | 80%         | 61%             | 80%         | 47%             | 80%         | 27%             | 77%         | 56%             | 75%         | 50%             | 74%         | 52%             | 67%         | 52%             |
| Hakone                 | 28%         | 10%             | 23%         | 7%              | 33%         | 13%             | 62%         | 27%             | 50%         | 12%             | 22%         | 7%              | 18%         | 5%              | 9%          | 2%              | 5%          | 2%              |
| Nikko                  | 14%         | 5%              | 8%          | 2%              | 21%         | 7%              | 27%         | 12%             | 17%         | 4%              | 15%         | 5%              | 6%          | 2%              | 9%          | 2%              | 6%          | 2%              |
| Matsumoto              | 9%          | 2%              | 6%          | 1%              | 22%         | 4%              | 12%         | 3%              | 4%          | 1%              | 11%         | 3%              | 5%          | 1%              | 6%          | 2%              | 6%          | 1%              |
| Karuzawa               | 14%         | 7%              | 3%          | 2%              | 13%         | 4%              | 55%         | 30%             | 30%         | 11%             | 6%          | 1%              | 3%          | 1%              | 3%          | 1%              | 3%          | 1%              |
| Hokkaido               | 65%         | 43%             | 54%         | 25%             | 74%         | 51%             | 81%         | 60%             | 75%         | 45%             | 65%         | 43%             | 63%         | 52%             | 63%         | 43%             | 46%         | 21%             |
| Sapporo                | 49%         | 22%             | 62%         | 32%             | 52%         | 21%             | 70%         | 30%             | 65%         | 24%             | 48%         | 24%             | 41%         | 18%             | 25%         | 11%             | 28%         | 11%             |
| Hakodate               | 20%         | 8%              | 13%         | 4%              | 18%         | 5%              | 51%         | 24%             | 41%         | 16%             | 11%         | 3%              | 13%         | 5%              | 6%          | 3%              | 4%          | 1%              |
| Obihiro / Tokachi      | 7%          | 2%              | 2%          | 1%              | 10%         | 2%              | 15%         | 6%              | 15%         | 5%              | 4%          | 1%              | 3%          | 1%              | 2%          | 0%              | 4%          | 1%              |
| Niseko                 | 5%          | 2%              | 2%          | 1%              | 14%         | 5%              | 4%          | 2%              | 5%          | 1%              | 4%          | 1%              | 4%          | 1%              | 5%          | 2%              | 2%          | 1%              |
| Shiretoko              | 6%          | 2%              | 1%          | 0%              | 12%         | 2%              | 8%          | 3%              | 14%         | 7%              | 3%          | 1%              | 4%          | 2%              | 3%          | 1%              | 3%          | 1%              |
| Kushiro / Akan         | 6%          | 2%              | 3%          | 0%              | 7%          | 1%              | 16%         | 7%              | 13%         | 7%              | 4%          | 1%              | 4%          | 1%              | 3%          | 1%              | 2%          | 1%              |
| Tohoku                 | 11%         | 3%              | 7%          | 2%              | 14%         | 2%              | 26%         | 9%              | 20%         | 4%              | 6%          | 1%              | 7%          | 2%              | 5%          | 1%              | 4%          | 1%              |
| Aomori                 | 19%         | 5%              | 20%         | 4%              | 20%         | 5%              | 49%         | 15%             | 38%         | 10%             | 9%          | 3%              | 6%          | 3%              | 4%          | 1%              | 6%          | 1%              |
| Sendai                 | 29%         | 8%              | 20%         | 5%              | 45%         | 15%             | 53%         | 14%             | 46%         | 11%             | 35%         | 11%             | 11%         | 4%              | 14%         | 3%              | 9%          | 3%              |
| Matsushima             | 11%         | 3%              | 4%          | 1%              | 24%         | 6%              | 13%         | 4%              | 20%         | 4%              | 9%          | 2%              | 5%          | 1%              | 8%          | 1%              | 6%          | 2%              |
| Hiraizumi              | 5%          | 1%              | 2%          | 0%              | 16%         | 4%              | 4%          | 1%              | 6%          | 1%              | 4%          | 1%              | 3%          | 1%              | 5%          | 2%              | 3%          | 1%              |
| Niigata                | 18%         | 4%              | 5%          | 1%              | 24%         | 5%              | 44%         | 11%             | 28%         | 5%              | 13%         | 3%              | 11%         | 3%              | 8%          | 3%              | 8%          | 2%              |
| Sado                   | 5%          | 1%              | 2%          | 1%              | 10%         | 1%              | 5%          | 2%              | 5%          | 1%              | 5%          | 1%              | 3%          | 1%              | 4%          | 1%              | 3%          | 1%              |
| Hokuriku               | 7%          | 2%              | 4%          | 1%              | 13%         | 3%              | 13%         | 5%              | 8%          | 3%              | 4%          | 1%              | 4%          | 2%              | 4%          | 1%              | 2%          | 1%              |
| Kanazawa               | 12%         | 3%              | 4%          | 2%              | 15%         | 3%              | 26%         | 8%              | 19%         | 5%              | 9%          | 3%              | 5%          | 2%              | 6%          | 2%              | 8%          | 1%              |
| Tateyama / Kurobe      | 12%         | 6%              | 3%          | 1%              | 10%         | 3%              | 41%         | 24%             | 26%         | 14%             | 5%          | 2%              | 4%          | 2%              | 2%          | 1%              | 2%          | 0%              |
| Toyama                 | 16%         | 5%              | 4%          | 1%              | 37%         | 15%             | 26%         | 8%              | 30%         | 7%              | 8%          | 2%              | 8%          | 3%              | 9%          | 3%              | 7%          | 2%              |
| Nagoya                 | 54%         | 21%             | 51%         | 12%             | 69%         | 38%             | 75%         | 35%             | 67%         | 22%             | 44%         | 13%             | 35%         | 11%             | 48%         | 20%             | 46%         | 16%             |
| Ise / Shima            | 11%         | 3%              | 3%          | 1%              | 17%         | 3%              | 29%         | 8%              | 21%         | 5%              | 8%          | 2%              | 4%          | 2%              | 4%          | 1%              | 3%          | 0%              |
| Hida / Takayama        | 9%          | 3%              | 4%          | 1%              | 9%          | 1%              | 30%         | 12%             | 15%         | 5%              | 5%          | 1%              | 4%          | 2%              | 5%          | 1%              | 3%          | 0%              |
| Kansai                 | 34%         | 10%             | 34%         | 6%              | 38%         | 11%             | 64%         | 25%             | 48%         | 12%             | 35%         | 12%             | 16%         | 4%              | 22%         | 5%              | 14%         | 4%              |
| Kyoto                  | 63%         | 32%             | 63%         | 23%             | 74%         | 49%             | 78%         | 43%             | 69%         | 26%             | 67%         | 37%             | 51%         | 24%             | 51%         | 27%             | 49%         | 25%             |
| Nara                   | 33%         | 12%             | 36%         | 9%              | 54%         | 25%             | 61%         | 24%             | 54%         | 15%             | 26%         | 10%             | 13%         | 5%              | 12%         | 3%              | 7%          | 2%              |
| Osaka                  | 69%         | 35%             | 66%         | 24%             | 75%         | 40%             | 80%         | 42%             | 79%         | 32%             | 67%         | 39%             | 61%         | 32%             | 65%         | 36%             | 59%         | 34%             |
| Kobe                   | 50%         | 16%             | 46%         | 12%             | 67%         | 28%             | 69%         | 26%             | 60%         | 15%             | 43%         | 12%             | 38%         | 11%             | 41%         | 12%             | 38%         | 11%             |
| Okayama                | 16%         | 4%              | 13%         | 2%              | 22%         | 4%              | 30%         | 7%              | 16%         | 4%              | 12%         | 2%              | 9%          | 4%              | 9%          | 2%              | 13%         | 4%              |
| Hiroshima              | 45%         | 12%             | 38%         | 5%              | 54%         | 16%             | 56%         | 16%             | 41%         | 7%              | 46%         | 14%             | 38%         | 12%             | 42%         | 10%             | 45%         | 16%             |
| Sannin                 | 5%          | 1%              | 1%          | 1%              | 11%         | 3%              | 11%         | 3%              | 5%          | 1%              | 2%          | 0%              | 2%          | 1%              | 2%          | 1%              | 2%          | 1%              |
| Tottori                | 13%         | 3%              | 25%         | 6%              | 18%         | 4%              | 26%         | 5%              | 19%         | 4%              | 4%          | 1%              | 3%          | 1%              | 3%          | 0%              | 4%          | 1%              |
| Matsue / Izumo         | 6%          | 2%              | 3%          | 0%              | 14%         | 2%              | 10%         | 3%              | 8%          | 2%              | 5%          | 1%              | 3%          | 1%              | 3%          | 1%              | 2%          | 1%              |
| Shikoku                | 22%         | 6%              | 10%         | 2%              | 40%         | 12%             | 44%         | 15%             | 36%         | 10%             | 17%         | 4%              | 6%          | 2%              | 11%         | 3%              | 8%          | 3%              |
| Shimanami Kaido        | 4%          | 1%              | 2%          | 0%              | 12%         | 3%              | 5%          | 2%              | 4%          | 1%              | 3%          | 0%              | 2%          | 1%              | 2%          | 0%              | 4%          | 1%              |
| Takamatsu              | 7%          | 2%              | 3%          | 0%              | 14%         | 2%              | 11%         | 3%              | 10%         | 2%              | 6%          | 1%              | 3%          | 2%              | 5%          | 1%              | 4%          | 1%              |
| Matsuyama / Dogo       | 7%          | 2%              | 4%          | 1%              | 16%         | 3%              | 10%         | 3%              | 12%         | 2%              | 7%          | 2%              | 2%          | 1%              | 3%          | 1%              | 4%          | 2%              |
| Kyushu                 | 42%         | 13%             | 54%         | 14%             | 53%         | 14%             | 67%         | 24%             | 66%         | 19%             | 33%         | 11%             | 23%         | 8%              | 20%         | 6%              | 16%         | 5%              |
| Fukuoka / Hakata       | 37%         | 10%             | 52%         | 15%             | 43%         | 9%              | 57%         | 18%             | 51%         | 11%             | 33%         | 12%             | 19%         | 7%              | 22%         | 5%              | 18%         | 6%              |
| Nagasaki               | 43%         | 12%             | 44%         | 11%             | 53%         | 14%             | 61%         | 21%             | 48%         | 10%             | 41%         | 13%             | 25%         | 9%              | 32%         | 7%              | 41%         | 12%             |
| Beppu / Yufuin         | 15%         | 5%              | 32%         | 14%             | 13%         | 4%              | 21%         | 10%             | 34%         | 7%              | 7%          | 3%              | 6%          | 3%              | 1%          | 0%              | 2%          | 0%              |
| Kumamoto / Aso         | 15%         | 4%              | 12%         | 3%              | 21%         | 5%              | 38%         | 11%             | 39%         | 11%             | 4%          | 1%              | 4%          | 2%              | 3%          | 1%              | 1%          | 0%              |
| Miyazaki               | 24%         | 6%              | 18%         | 5%              | 40%         | 10%             | 47%         | 13%             | 44%         | 8%              | 16%         | 3%              | 8%          | 2%              | 10%         | 3%              | 7%          | 2%              |
| Kagoshima              | 30%         | 10%             | 25%         | 5%              | 48%         | 17%             | 66%         | 29%             | 61%         | 20%             | 9%          | 4%              | 10%         | 3%              | 9%          | 3%              | 9%          | 2%              |
| Okinawa                | 53%         | 24%             | 50%         | 23%             | 64%         | 31%             | 75%         | 39%             | 71%         | 34%             | 44%         | 19%             | 44%         | 19%             | 41%         | 16%             | 34%         | 12%             |
| Know none of the above | 5%          | 3%              | 5%          | 8%              | 1%          | 1%              | 2%          | 3%              | 2%          | 2%              | 4%          | 1%              | 9%          | 2%              | 6%          | 2%              | 9%          | 1%              |

Note: The top 5 items are indicated in red or yellow.

18. **All respondents** Traveler recognition of Japanese tourist areas, by number of past visits: “Where would you like to visit in Japan?”

◆ **More visits to Japan means greater recognition of Japan’s tourist spots.**

- Knowledge of Japanese tourist areas proved greatest among respondents who had visited most frequently, regardless of their nationality.
- Respondents showed high levels of recognition for the “Golden Route” and Hokkaido, whether they had been to Japan or not. Repeat visitors, however, were familiar with other areas as well: Tateyama and Kurobe were well known to those from Taiwan and Hong Kong, and Hiroshima to those from Indonesia.

(Multiple responses)

| Respondents→<br>Number of visits to Japan→ | All  |     |           | Korea |     |           | China |     |           | Taiwan |     |           | Hong Kong |     |           | Thailand |     |           | Singapore |     |           | Malaysia |     |           | Indonesia |     |           |
|--|------|-----|-----------|-------|-----|-----------|-------|-----|-----------|--------|-----|-----------|-----------|-----|-----------|----------|-----|-----------|-----------|-----|-----------|----------|-----|-----------|-----------|-----|-----------|
|  | 0    | 1   | 2 or more | 0     | 1   | 2 or more | 0     | 1   | 2 or more | 0      | 1   | 2 or more | 0         | 1   | 2 or more | 0        | 1   | 2 or more | 0         | 1   | 2 or more | 0        | 1   | 2 or more | 0         | 1   | 2 or more |
| Sample size                                | 2133 | 851 | 1016      | 223   | 112 | 165       | 220   | 170 | 110       | 156    | 114 | 230       | 142       | 105 | 253       | 275      | 125 | 100       | 318       | 96  | 86        | 393      | 70  | 37        | 406       | 59  | 35        |
| Tokyo                                      | 70%  | 84% | 90%       | 66%   | 76% | 87%       | 72%   | 88% | 83%       | 73%    | 87% | 89%       | 75%       | 83% | 92%       | 67%      | 86% | 91%       | 67%       | 93% | 94%       | 74%      | 77% | 92%       | 67%       | 78% | 94%       |
| Mt. Fuji                                   | 69%  | 78% | 83%       | 59%   | 63% | 72%       | 73%   | 85% | 86%       | 76%    | 78% | 83%       | 75%       | 74% | 86%       | 70%      | 82% | 88%       | 69%       | 81% | 88%       | 72%      | 81% | 81%       | 63%       | 81% | 91%       |
| Hakone                                     | 14%  | 31% | 54%       | 14%   | 21% | 38%       | 24%   | 38% | 43%       | 51%    | 52% | 75%       | 34%       | 35% | 64%       | 13%      | 25% | 44%       | 8%        | 28% | 44%       | 6%       | 14% | 35%       | 2%        | 20% | 20%       |
| Nikko                                      | 7%   | 14% | 27%       | 4%    | 4%  | 17%       | 11%   | 19% | 41%       | 16%    | 26% | 34%       | 8%        | 9%  | 25%       | 9%       | 14% | 33%       | 2%        | 10% | 19%       | 7%       | 11% | 19%       | 3%        | 17% | 23%       |
| Matsumoto                                  | 6%   | 10% | 15%       | 3%    | 2%  | 12%       | 14%   | 25% | 33%       | 10%    | 9%  | 14%       | 1%        | 5%  | 5%        | 8%       | 8%  | 22%       | 3%        | 4%  | 14%       | 5%       | 10% | 14%       | 4%        | 12% | 23%       |
| Karuizawa                                  | 6%   | 14% | 32%       | 0%    | 1%  | 8%        | 4%    | 18% | 25%       | 45%    | 46% | 65%       | 18%       | 17% | 42%       | 3%       | 6%  | 11%       | 2%        | 2%  | 6%        | 1%       | 6%  | 14%       | 1%        | 5%  | 17%       |
| Hokkaido                                   | 58%  | 69% | 78%       | 50%   | 50% | 62%       | 69%   | 77% | 78%       | 75%    | 79% | 87%       | 65%       | 70% | 83%       | 60%      | 67% | 79%       | 56%       | 73% | 77%       | 61%      | 66% | 73%       | 42%       | 61% | 71%       |
| Sapporo                                    | 38%  | 52% | 70%       | 55%   | 59% | 73%       | 48%   | 50% | 63%       | 66%    | 58% | 80%       | 58%       | 57% | 72%       | 41%      | 53% | 61%       | 31%       | 53% | 65%       | 21%      | 31% | 57%       | 23%       | 44% | 49%       |
| Hakodate                                   | 9%   | 19% | 42%       | 6%    | 7%  | 25%       | 10%   | 21% | 30%       | 37%    | 41% | 64%       | 23%       | 28% | 57%       | 6%       | 14% | 18%       | 7%        | 18% | 33%       | 4%       | 7%  | 24%       | 1%        | 5%  | 23%       |
| Obihiro / Tokachi                          | 3%   | 6%  | 16%       | 1%    | 0%  | 4%        | 3%    | 12% | 23%       | 7%     | 9%  | 24%       | 12%       | 8%  | 21%       | 3%       | 3%  | 7%        | 2%        | 4%  | 6%        | 2%       | 4%  | 5%        | 2%        | 8%  | 14%       |
| Niseko                                     | 2%   | 6%  | 9%        | 0%    | 0%  | 5%        | 8%    | 15% | 24%       | 2%     | 2%  | 6%        | 4%        | 3%  | 6%        | 1%       | 6%  | 8%        | 2%        | 6%  | 10%       | 4%       | 6%  | 16%       | 0%        | 5%  | 17%       |
| Shiretoko                                  | 2%   | 7%  | 14%       | 0%    | 1%  | 2%        | 6%    | 12% | 23%       | 1%     | 5%  | 15%       | 5%        | 8%  | 23%       | 1%       | 4%  | 6%        | 3%        | 5%  | 7%        | 2%       | 9%  | 5%        | 2%        | 8%  | 14%       |
| Kushiro / Akan                             | 2%   | 4%  | 17%       | 0%    | 1%  | 7%        | 2%    | 6%  | 18%       | 7%     | 7%  | 27%       | 7%        | 5%  | 21%       | 2%       | 3%  | 12%       | 1%        | 5%  | 12%       | 2%       | 4%  | 5%        | 0%        | 3%  | 11%       |
| Tohoku                                     | 5%   | 10% | 24%       | 4%    | 3%  | 14%       | 8%    | 15% | 24%       | 17%    | 20% | 34%       | 13%       | 10% | 28%       | 3%       | 5%  | 15%       | 3%        | 5%  | 20%       | 3%       | 10% | 14%       | 1%        | 15% | 14%       |
| Aomori                                     | 9%   | 20% | 39%       | 15%   | 14% | 30%       | 11%   | 24% | 31%       | 40%    | 41% | 58%       | 24%       | 28% | 51%       | 4%       | 13% | 17%       | 2%        | 8%  | 20%       | 3%       | 6%  | 14%       | 3%        | 14% | 26%       |
| Sendai                                     | 19%  | 33% | 46%       | 17%   | 12% | 28%       | 40%   | 49% | 51%       | 48%    | 52% | 67%       | 36%       | 33% | 56%       | 27%      | 40% | 50%       | 7%        | 11% | 27%       | 10%      | 24% | 38%       | 5%        | 25% | 20%       |
| Matsushima                                 | 7%   | 12% | 20%       | 2%    | 2%  | 8%        | 18%   | 24% | 39%       | 9%     | 8%  | 19%       | 11%       | 12% | 28%       | 6%       | 10% | 17%       | 4%        | 4%  | 10%       | 7%       | 14% | 8%        | 4%        | 15% | 11%       |
| Hiraizumi                                  | 3%   | 7%  | 10%       | 1%    | 0%  | 5%        | 10%   | 14% | 31%       | 3%     | 4%  | 4%        | 4%        | 3%  | 8%        | 1%       | 4%  | 10%       | 1%        | 5%  | 7%        | 3%       | 13% | 11%       | 2%        | 10% | 9%        |
| Niigata                                    | 11%  | 19% | 30%       | 2%    | 2%  | 12%       | 16%   | 25% | 38%       | 44%    | 41% | 45%       | 23%       | 16% | 36%       | 11%      | 15% | 17%       | 8%        | 13% | 19%       | 6%       | 14% | 27%       | 5%        | 19% | 17%       |
| Sado                                       | 3%   | 5%  | 8%        | 2%    | 0%  | 4%        | 5%    | 13% | 16%       | 3%     | 3%  | 8%        | 2%        | 2%  | 7%        | 3%       | 5%  | 12%       | 2%        | 2%  | 6%        | 3%       | 6%  | 11%       | 1%        | 5%  | 11%       |
| Hokuriku                                   | 3%   | 7%  | 14%       | 3%    | 2%  | 6%        | 12%   | 27% | 3%        | 11%    | 21% | 5%        | 2%        | 13% | 2%        | 7%       | 5%  | 2%        | 4%        | 9%  | 3%        | 9%       | 11% | 1%        | 5%        | 11% |           |
| Kanazawa                                   | 5%   | 10% | 26%       | 2%    | 1%  | 9%        | 5%    | 18% | 30%       | 12%    | 17% | 39%       | 8%        | 10% | 30%       | 5%       | 6%  | 24%       | 3%        | 5%  | 13%       | 5%       | 6%  | 22%       | 5%        | 17% | 26%       |
| Tateyama / Kurobe                          | 4%   | 10% | 29%       | 0%    | 2%  | 8%        | 5%    | 10% | 18%       | 26%    | 27% | 57%       | 8%        | 16% | 40%       | 2%       | 3%  | 13%       | 2%        | 4%  | 13%       | 1%       | 6%  | 8%        | 0%        | 8%  | 9%        |
| Toyama                                     | 10%  | 18% | 28%       | 1%    | 2%  | 10%       | 28%   | 41% | 46%       | 19%    | 25% | 32%       | 25%       | 19% | 38%       | 5%       | 6%  | 21%       | 4%        | 10% | 16%       | 8%       | 10% | 19%       | 5%        | 15% | 20%       |
| Nagoya                                     | 46%  | 58% | 69%       | 46%   | 43% | 64%       | 61%   | 79% | 70%       | 71%    | 68% | 82%       | 60%       | 62% | 73%       | 40%      | 42% | 56%       | 28%       | 40% | 55%       | 47%      | 49% | 57%       | 41%       | 68% | 66%       |
| Ise / Shima                                | 6%   | 10% | 21%       | 1%    | 1%  | 6%        | 11%   | 20% | 23%       | 26%    | 18% | 36%       | 15%       | 12% | 27%       | 7%       | 6%  | 14%       | 3%        | 4%  | 10%       | 3%       | 4%  | 11%       | 2%        | 5%  | 9%        |
| Hida / Takayama                            | 4%   | 8%  | 22%       | 3%    | 1%  | 7%        | 3%    | 12% | 15%       | 15%    | 18% | 45%       | 6%        | 6%  | 24%       | 3%       | 4%  | 12%       | 2%        | 6%  | 13%       | 3%       | 10% | 16%       | 2%        | 5%  | 14%       |
| Kansai                                     | 24%  | 38% | 51%       | 26%   | 35% | 43%       | 28%   | 48% | 45%       | 58%    | 62% | 69%       | 42%       | 34% | 56%       | 32%      | 30% | 51%       | 12%       | 15% | 31%       | 18%      | 39% | 35%       | 10%       | 31% | 23%       |
| Kyoto                                      | 53%  | 71% | 77%       | 54%   | 66% | 73%       | 67%   | 82% | 73%       | 70%    | 73% | 86%       | 56%       | 64% | 77%       | 62%      | 70% | 78%       | 41%       | 71% | 69%       | 47%      | 61% | 76%       | 45%       | 73% | 66%       |
| Nara                                       | 19%  | 39% | 56%       | 24%   | 40% | 49%       | 46%   | 63% | 54%       | 51%    | 53% | 72%       | 42%       | 42% | 65%       | 19%      | 26% | 43%       | 5%        | 20% | 37%       | 8%       | 20% | 41%       | 4%        | 20% | 26%       |
| Osaka                                      | 59%  | 76% | 82%       | 52%   | 71% | 80%       | 68%   | 82% | 76%       | 73%    | 75% | 87%       | 72%       | 74% | 86%       | 63%      | 69% | 75%       | 50%       | 80% | 80%       | 61%      | 74% | 89%       | 53%       | 85% | 77%       |
| Kobe                                       | 41%  | 56% | 64%       | 40%   | 36% | 61%       | 59%   | 77% | 68%       | 67%    | 63% | 73%       | 56%       | 54% | 65%       | 38%      | 44% | 56%       | 30%       | 49% | 53%       | 36%      | 56% | 62%       | 33%       | 59% | 57%       |
| Okayama                                    | 11%  | 16% | 26%       | 9%    | 13% | 19%       | 15%   | 25% | 33%       | 27%    | 22% | 37%       | 13%       | 10% | 21%       | 9%       | 10% | 23%       | 7%        | 6%  | 19%       | 8%       | 10% | 22%       | 10%       | 24% | 29%       |
| Hiroshima                                  | 43%  | 42% | 52%       | 39%   | 28% | 44%       | 53%   | 55% | 57%       | 54%    | 49% | 61%       | 42%       | 30% | 45%       | 47%      | 37% | 53%       | 32%       | 44% | 51%       | 41%      | 37% | 51%       | 42%       | 53% | 74%       |
| Sannin                                     | 2%   | 5%  | 10%       | 0%    | 0%  | 4%        | 5%    | 12% | 23%       | 6%     | 8%  | 15%       | 4%        | 2%  | 8%        | 1%       | 4%  | 4%        | 1%        | 2%  | 5%        | 1%       | 7%  | 5%        | 0%        | 5%  | 11%       |
| Tottori                                    | 7%   | 12% | 25%       | 21%   | 16% | 36%       | 10%   | 21% | 27%       | 20%    | 22% | 32%       | 12%       | 10% | 26%       | 3%       | 2%  | 10%       | 3%        | 4%  | 6%        | 2%       | 4%  | 5%        | 2%        | 10% | 14%       |
| Matsue / Izumo                             | 3%   | 7%  | 12%       | 1%    | 3%  | 5%        | 7%    | 15% | 26%       | 7%     | 7%  | 14%       | 4%        | 4%  | 13%       | 3%       | 5%  | 11%       | 1%        | 4%  | 8%        | 2%       | 6%  | 8%        | 1%        | 5%  | 11%       |
| Shikoku                                    | 14%  | 24% | 35%       | 8%    | 8%  | 15%       | 34%   | 44% | 46%       | 44%    | 41% | 45%       | 27%       | 27% | 45%       | 15%      | 13% | 28%       | 5%        | 4%  | 14%       | 9%       | 23% | 16%       | 4%        | 22% | 31%       |
| Shimanami Kaido                            | 2%   | 5%  | 7%        | 0%    | 2%  | 3%        | 5%    | 14% | 23%       | 3%     | 5%  | 6%        | 4%        | 1%  | 6%        | 1%       | 6%  | 3%        | 1%        | 2%  | 5%        | 2%       | 3%  | 0%        | 2%        | 3%  | 20%       |
| Takamatsu                                  | 4%   | 6%  | 14%       | 2%    | 1%  | 7%        | 7%    | 14% | 29%       | 8%     | 6%  | 15%       | 10%       | 3%  | 13%       | 3%       | 7%  | 14%       | 3%        | 3%  | 7%        | 4%       | 7%  | 11%       | 3%        | 5%  | 20%       |
| Matsuyama / Dogo                           | 4%   | 8%  | 14%       | 2%    | 1%  | 9%        | 7%    | 17% | 32%       | 6%     | 11% | 13%       | 13%       | 4%  | 15%       | 3%       | 9%  | 16%       | 1%        | 1%  | 6%        | 3%       | 6%  | 5%        | 3%        | 7%  | 14%       |
| Kyushu                                     | 30%  | 45% | 62%       | 48%   | 46% | 68%       | 45%   | 56% | 65%       | 62%    | 63% | 72%       | 61%       | 60% | 72%       | 32%      | 32% | 36%       | 17%       | 27% | 43%       | 19%      | 27% | 24%       | 12%       | 32% | 37%       |
| Fukuoka / Hakata                           | 27%  | 40% | 55%       | 48%   | 47% | 62%       | 35%   | 46% | 52%       | 49%    | 50% | 65%       | 43%       | 47% | 58%       | 28%      | 33% | 46%       | 14%       | 19% | 42%       | 20%      | 29% | 35%       | 14%       | 37% | 31%       |
| Nagasaki                                   | 37%  | 45% | 54%       | 40%   | 38% | 53%       | 46%   | 63% | 50%       | 56%    | 59% | 66%       | 44%       | 45% | 51%       | 39%      | 33% | 57%       | 21%       | 27% | 36%       | 31%      | 33% | 41%       | 38%       | 53% | 54%       |
| Beppu / YuFuin                             | 6%   | 12% | 35%       | 21%   | 29% | 51%       | 4%    | 15% | 30%       | 11%    | 13% | 33%       | 26%       | 15% | 45%       | 3%       | 4%  | 25%       | 3%        | 4%  | 19%       | 1%       | 3%  | 5%        | 1%        | 10% | 9%        |
| Kumamoto / Aso                             | 7%   | 14% | 34%       | 5%    | 7%  | 25%       | 12%   | 24% | 34%       | 29%    | 28% | 48%       | 30%       | 25% | 50%       | 3%       | 2%  | 12%       | 2%        | 2%  | 10%       | 3%       | 6%  | 8%        | 0%        | 3%  | 11%       |
| Miyazaki                                   | 16%  | 26% | 39%       | 13%   | 18% | 25%       | 34%   | 44% | 47%       | 43%    | 42% | 51%       | 40%       | 37% | 48%       | 13%      | 13% | 29%       | 5%        | 8%  | 19%       | 9%       | 7%  | 22%       | 4%        | 17% | 31%       |
| Kagoshima                                  | 19%  | 30% | 50%       | 25%   | 18% | 31%       | 40%   | 49% | 63%       | 63%    | 55% | 73%       | 56%       | 53% | 68%       | 5%       | 8%  | 21%       | 9%        | 6%  | 19%       | 8%       | 11% | 14%       | 5%        | 20% | 29%       |
| Okinawa                                    | 45%  | 57% | 68%       | 48%   | 44% | 57%       | 60%   | 66% | 71%       | 71%    | 72% | 80%       | 68%       | 68% | 74%       | 37%      | 48% | 59%       | 40%       | 51% | 51%       | 39%      | 46% | 62%       | 31%       | 46% | 60%       |
| Know none of the above                     | 9%   | 0%  | 0%        | 12%   | 1%  | 0%        | 2%    | 0%  | 0%        | 7%     | 0%  | 0%        | 6%        | 0%  | 0%        | 7%       | 0%  | 0%        | 14%       | 0%  | 0%        | 8%       | 0%  | 0%        | 12%       | 0%  | 0%        |

Note: The top 5 items are indicated in red, orange or yellow.

19.

All respondents

Desire to visit a Japanese tourist area, by number of visits to Japan: "Where in Japan would you like to go?"

◆ Repeat visitors want to travel extensively in Japan

- Repeat visitors to Japan are familiar with all of the nation's tourist areas and are eager to visit them. Regional initiatives are needed to promote recognition of localities and their tourist resources and enhance their value to draw in repeat visitors.
- Of all areas which rose in ranking because of interest by repeat visitors, Hakone and Nara showed the greatest increases.

(Multiple responses)

| Respondents       | All  |     |           | Korea |     |           | China |     |           | Taiwan |     |           | Hong Kong |     |           | Thailand |     |           | Singapore |     |           | Malaysia |     |           | Indonesia |     |           |
|-------------------|------|-----|-----------|-------|-----|-----------|-------|-----|-----------|--------|-----|-----------|-----------|-----|-----------|----------|-----|-----------|-----------|-----|-----------|----------|-----|-----------|-----------|-----|-----------|
|                   | 0    | 1   | 2 or more | 0     | 1   | 2 or more | 0     | 1   | 2 or more | 0      | 1   | 2 or more | 0         | 1   | 2 or more | 0        | 1   | 2 or more | 0         | 1   | 2 or more | 0        | 1   | 2 or more | 0         | 1   | 2 or more |
| Sample size       | 1943 | 850 | 1016      | 197   | 111 | 165       | 215   | 170 | 110       | 145    | 114 | 230       | 134       | 105 | 253       | 257      | 125 | 100       | 275       | 96  | 86        | 361      | 70  | 37        | 359       | 59  | 35        |
| Tokyo             | 50%  | 43% | 44%       | 35%   | 37% | 33%       | 52%   | 52% | 55%       | 46%    | 46% | 48%       | 38%       | 30% | 37%       | 50%      | 41% | 62%       | 56%       | 48% | 45%       | 56%      | 49% | 43%       | 53%       | 42% | 46%       |
| Mt. Fuji          | 50%  | 45% | 42%       | 27%   | 26% | 35%       | 64%   | 59% | 57%       | 54%    | 39% | 46%       | 26%       | 27% | 27%       | 58%      | 53% | 53%       | 50%       | 50% | 51%       | 53%      | 53% | 41%       | 51%       | 51% | 66%       |
| Hakone            | 4%   | 10% | 20%       | 5%    | 5%  | 12%       | 7%    | 17% | 18%       | 17%    | 22% | 37%       | 4%        | 4%  | 19%       | 4%       | 10% | 13%       | 2%        | 8%  | 13%       | 1%       | 3%  | 8%        | 0%        | 3%  | 11%       |
| Nikko             | 2%   | 4%  | 11%       | 1%    | 1%  | 4%        | 3%    | 6%  | 15%       | 4%     | 6%  | 19%       | 1%        | 0%  | 8%        | 2%       | 4%  | 13%       | 1%        | 3%  | 7%        | 1%       | 6%  | 8%        | 1%        | 5%  | 9%        |
| Matsumoto         | 1%   | 3%  | 4%        | 1%    | 0%  | 2%        | 0%    | 6%  | 6%        | 1%     | 2%  | 5%        | 0%        | 0%  | 1%        | 2%       | 2%  | 8%        | 0%        | 3%  | 2%        | 2%       | 4%  | 3%        | 1%        | 3%  | 6%        |
| Karuizawa         | 2%   | 5%  | 16%       | 1%    | 1%  | 4%        | 1%    | 5%  | 9%        | 19%    | 24% | 40%       | 5%        | 3%  | 18%       | 1%       | 2%  | 2%        | 1%        | 1%  | 1%        | 0%       | 1%  | 5%        | 1%        | 2%  | 6%        |
| Hokkaido          | 40%  | 44% | 47%       | 21%   | 25% | 28%       | 52%   | 55% | 45%       | 63%    | 53% | 62%       | 43%       | 40% | 49%       | 43%      | 40% | 48%       | 51%       | 54% | 55%       | 42%      | 43% | 43%       | 20%       | 25% | 23%       |
| Sapporo           | 15%  | 22% | 35%       | 25%   | 30% | 40%       | 13%   | 24% | 32%       | 23%    | 18% | 41%       | 19%       | 19% | 30%       | 20%      | 24% | 35%       | 12%       | 27% | 29%       | 9%       | 14% | 30%       | 9%        | 14% | 29%       |
| Hakodate          | 2%   | 6%  | 19%       | 1%    | 3%  | 8%        | 2%    | 9%  | 5%        | 13%    | 14% | 36%       | 7%        | 8%  | 24%       | 0%       | 4%  | 9%        | 1%        | 6%  | 13%       | 2%       | 3%  | 8%        | 0%        | 0%  | 14%       |
| Obihiro / Tokachi | 1%   | 1%  | 6%        | 0%    | 0%  | 2%        | 1%    | 1%  | 7%        | 1%     | 1%  | 10%       | 3%        | 2%  | 8%        | 0%       | 0%  | 2%        | 1%        | 0%  | 2%        | 0%       | 1%  | 3%        | 1%        | 0%  | 9%        |
| Niseko            | 1%   | 2%  | 4%        | 0%    | 0%  | 3%        | 3%    | 5%  | 8%        | 1%     | 1%  | 2%        | 1%        | 0%  | 2%        | 0%       | 2%  | 3%        | 0%        | 1%  | 2%        | 1%       | 1%  | 1%        | 1%        | 0%  | 6%        |
| Shiretoko         | 1%   | 1%  | 6%        | 0%    | 0%  | 1%        | 1%    | 2%  | 5%        | 1%     | 1%  | 7%        | 1%        | 1%  | 11%       | 0%       | 1%  | 3%        | 1%        | 2%  | 5%        | 1%       | 3%  | 3%        | 0%        | 2%  | 3%        |
| Kushiro / Akan    | 1%   | 1%  | 7%        | 0%    | 0%  | 1%        | 0%    | 1%  | 4%        | 2%     | 0%  | 13%       | 3%        | 1%  | 11%       | 0%       | 1%  | 3%        | 1%        | 2%  | 2%        | 0%       | 4%  | 0%        | 0%        | 2%  | 6%        |
| Tohoku            | 1%   | 2%  | 8%        | 1%    | 1%  | 5%        | 2%    | 2%  | 5%        | 6%     | 3%  | 13%       | 1%        | 0%  | 8%        | 0%       | 1%  | 3%        | 0%        | 2%  | 8%        | 0%       | 4%  | 8%        | 0%        | 2%  | 6%        |
| Aomori            | 2%   | 4%  | 13%       | 4%    | 3%  | 6%        | 1%    | 5%  | 11%       | 8%     | 11% | 22%       | 3%        | 4%  | 16%       | 1%       | 2%  | 8%        | 0%        | 3%  | 9%        | 1%       | 1%  | 8%        | 0%        | 2%  | 6%        |
| Sendai            | 4%   | 8%  | 15%       | 4%    | 2%  | 8%        | 8%    | 15% | 26%       | 11%    | 10% | 18%       | 4%        | 6%  | 16%       | 6%       | 11% | 22%       | 3%        | 1%  | 7%        | 2%       | 10% | 5%        | 2%        | 7%  | 3%        |
| Matsushima        | 2%   | 2%  | 6%        | 1%    | 0%  | 3%        | 4%    | 4%  | 13%       | 3%     | 1%  | 7%        | 2%        | 0%  | 8%        | 1%       | 1%  | 5%        | 1%        | 1%  | 2%        | 1%       | 3%  | 0%        | 2%        | 5%  | 3%        |
| Hiraizumi         | 1%   | 2%  | 2%        | 1%    | 0%  | 1%        | 2%    | 3%  | 7%        | 1%     | 0%  | 1%        | 1%        | 0%  | 1%        | 0%       | 2%  | 5%        | 0%        | 2%  | 3%        | 1%       | 6%  | 5%        | 0%        | 5%  | 3%        |
| Niigata           | 2%   | 5%  | 8%        | 0%    | 0%  | 4%        | 3%    | 6%  | 7%        | 8%     | 10% | 14%       | 1%        | 2%  | 8%        | 2%       | 2%  | 6%        | 1%        | 5%  | 7%        | 1%       | 4%  | 11%       | 2%        | 7%  | 3%        |
| Sado              | 1%   | 1%  | 2%        | 1%    | 0%  | 1%        | 1%    | 2%  | 1%        | 1%     | 0%  | 3%        | 0%        | 1%  | 2%        | 0%       | 2%  | 2%        | 0%        | 2%  | 1%        | 0%       | 3%  | 5%        | 1%        | 2%  | 0%        |
| Hokuriku          | 1%   | 2%  | 5%        | 1%    | 0%  | 2%        | 2%    | 4%  | 4%        | 1%     | 3%  | 9%        | 0%        | 0%  | 5%        | 1%       | 1%  | 1%        | 1%        | 3%  | 6%        | 1%       | 3%  | 0%        | 1%        | 2%  | 3%        |
| Kanazawa          | 1%   | 2%  | 8%        | 1%    | 1%  | 4%        | 0%    | 3%  | 8%        | 3%     | 4%  | 13%       | 1%        | 0%  | 8%        | 1%       | 3%  | 9%        | 1%        | 2%  | 3%        | 1%       | 3%  | 5%        | 1%        | 2%  | 3%        |
| Tateyama / Kurobe | 2%   | 4%  | 16%       | 0%    | 1%  | 2%        | 1%    | 2%  | 6%        | 12%    | 12% | 37%       | 4%        | 9%  | 23%       | 0%       | 2%  | 6%        | 1%        | 3%  | 0%        | 3%       | 0%  | 3%        | 0%        | 0%  | 3%        |
| Toyama            | 3%   | 6%  | 9%        | 0%    | 0%  | 4%        | 10%   | 17% | 21%       | 3%     | 5%  | 12%       | 4%        | 2%  | 11%       | 1%       | 2%  | 5%        | 2%        | 5%  | 2%        | 3%       | 4%  | 5%        | 1%        | 3%  | 6%        |
| Nagoya            | 18%  | 22% | 26%       | 11%   | 8%  | 16%       | 31%   | 44% | 40%       | 34%    | 27% | 39%       | 24%       | 18% | 22%       | 9%       | 12% | 22%       | 8%        | 11% | 20%       | 21%      | 20% | 16%       | 14%       | 20% | 26%       |
| Ise / Shima       | 1%   | 2%  | 7%        | 0%    | 0%  | 2%        | 1%    | 5%  | 5%        | 3%     | 4%  | 12%       | 0%        | 3%  | 8%        | 2%       | 0%  | 5%        | 1%        | 2%  | 6%        | 0%       | 1%  | 3%        | 0%        | 0%  | 3%        |
| Hida / Takayama   | 1%   | 2%  | 8%        | 1%    | 0%  | 2%        | 0%    | 2%  | 3%        | 3%     | 7%  | 20%       | 1%        | 0%  | 9%        | 1%       | 1%  | 2%        | 0%        | 2%  | 5%        | 0%       | 3%  | 3%        | 0%        | 0%  | 0%        |
| Kansai            | 6%   | 12% | 17%       | 2%    | 6%  | 10%       | 7%    | 16% | 9%        | 22%    | 22% | 29%       | 5%        | 10% | 17%       | 8%       | 14% | 22%       | 3%        | 4%  | 9%        | 4%       | 10% | 14%       | 2%        | 10% | 9%        |
| Kyoto             | 28%  | 37% | 36%       | 20%   | 23% | 28%       | 41%   | 58% | 52%       | 43%    | 36% | 47%       | 26%       | 24% | 26%       | 36%      | 38% | 41%       | 18%       | 29% | 35%       | 25%      | 37% | 24%       | 22%       | 41% | 31%       |
| Nara              | 6%   | 14% | 23%       | 5%    | 5%  | 18%       | 18%   | 31% | 29%       | 14%    | 18% | 33%       | 10%       | 10% | 20%       | 7%       | 9%  | 20%       | 1%        | 6%  | 17%       | 1%       | 7%  | 16%       | 1%        | 7%  | 6%        |
| Osaka             | 33%  | 38% | 38%       | 20%   | 29% | 27%       | 35%   | 44% | 42%       | 43%    | 36% | 45%       | 29%       | 29% | 36%       | 36%      | 38% | 46%       | 28%       | 43% | 34%       | 36%      | 39% | 30%       | 32%       | 44% | 34%       |
| Kobe              | 11%  | 16% | 25%       | 6%    | 7%  | 21%       | 23%   | 27% | 37%       | 18%    | 21% | 33%       | 13%       | 6%  | 20%       | 9%       | 11% | 23%       | 7%        | 15% | 22%       | 10%      | 21% | 16%       | 9%        | 20% | 14%       |
| Okayama           | 2%   | 3%  | 8%        | 1%    | 1%  | 5%        | 1%    | 5%  | 10%       | 5%     | 7%  | 9%        | 1%        | 0%  | 7%        | 0%       | 4%  | 6%        | 3%        | 1%  | 7%        | 2%       | 1%  | 8%        | 2%        | 3%  | 17%       |
| Hiroshima         | 11%  | 10% | 16%       | 4%    | 3%  | 8%        | 13%   | 13% | 27%       | 11%    | 14% | 20%       | 6%        | 4%  | 9%        | 13%      | 10% | 21%       | 8%        | 15% | 20%       | 10%      | 14% | 11%       | 16%       | 12% | 26%       |
| Sannin            | 0%   | 1%  | 3%        | 0%    | 0%  | 2%        | 1%    | 2%  | 6%        | 1%     | 1%  | 5%        | 0%        | 0%  | 2%        | 0%       | 1%  | 1%        | 0%        | 1%  | 1%        | 0%       | 4%  | 3%        | 0%        | 3%  | 3%        |
| Tottori           | 1%   | 2%  | 7%        | 4%    | 3%  | 10%       | 1%    | 4%  | 8%        | 1%     | 2%  | 9%        | 3%        | 1%  | 6%        | 0%       | 1%  | 5%        | 1%        | 2%  | 1%        | 0%       | 1%  | 0%        | 1%        | 0%  | 6%        |
| Matsue / Izumo    | 1%   | 1%  | 3%        | 1%    | 0%  | 1%        | 1%    | 3%  | 4%        | 1%     | 1%  | 6%        | 1%        | 0%  | 3%        | 0%       | 0%  | 4%        | 0%        | 2%  | 3%        | 0%       | 1%  | 3%        | 1%        | 3%  | 3%        |
| Shikoku           | 3%   | 7%  | 13%       | 2%    | 1%  | 3%        | 6%    | 12% | 22%       | 10%    | 11% | 21%       | 6%        | 7%  | 14%       | 2%       | 4%  | 10%       | 1%        | 3%  | 1%        | 2%       | 7%  | 3%        | 1%        | 7%  | 14%       |
| Shimane Kaido     | 0%   | 1%  | 2%        | 0%    | 0%  | 1%        | 1%    | 3%  | 5%        | 1%     | 2%  | 3%        | 1%        | 0%  | 2%        | 0%       | 1%  | 0%        | 1%        | 2%  | 2%        | 0%       | 1%  | 0%        | 1%        | 0%  | 6%        |
| Takamatsu         | 1%   | 1%  | 4%        | 0%    | 0%  | 1%        | 0%    | 1%  | 5%        | 1%     | 2%  | 5%        | 0%        | 0%  | 5%        | 0%       | 2%  | 4%        | 1%        | 2%  | 2%        | 1%       | 4%  | 3%        | 1%        | 0%  | 9%        |
| Matsuyama / Dogo  | 1%   | 2%  | 4%        | 1%    | 0%  | 2%        | 0%    | 5%  | 6%        | 1%     | 2%  | 5%        | 0%        | 0%  | 4%        | 0%       | 1%  | 8%        | 1%        | 1%  | 2%        | 1%       | 3%  | 3%        | 1%        | 2%  | 6%        |
| Kyushu            | 8%   | 12% | 22%       | 10%   | 7%  | 24%       | 7%    | 15% | 26%       | 23%    | 18% | 27%       | 15%       | 12% | 23%       | 11%      | 10% | 14%       | 5%        | 7%  | 19%       | 5%       | 10% | 5%        | 3%        | 14% | 11%       |
| Fukuoka / Hakata  | 7%   | 11% | 17%       | 14%   | 14% | 16%       | 7%    | 10% | 12%       | 13%    | 14% | 24%       | 9%        | 7%  | 13%       | 7%       | 12% | 23%       | 5%        | 5%  | 15%       | 4%       | 9%  | 14%       | 4%        | 15% | 14%       |
| Nagasaki          | 9%   | 11% | 18%       | 9%    | 8%  | 15%       | 13%   | 12% | 19%       | 14%    | 17% | 27%       | 5%        | 9%  | 13%       | 12%      | 9%  | 23%       | 8%        | 9%  | 13%       | 6%       | 10% | 11%       | 10%       | 20% | 23%       |
| Beppu / YuFuin    | 2%   | 5%  | 13%       | 9%    | 12% | 22%       | 0%    | 4%  | 9%        | 4%     | 5%  | 15%       | 2%        | 3%  | 11%       | 0%       | 3%  | 12%       | 1%        | 3%  | 7%        | 0%       | 3%  | 0%        | 0%        | 2%  | 0%        |
| Kumamoto / Aso    | 1%   | 3%  | 11%       | 2%    | 1%  | 5%        | 2%    | 5%  | 10%       | 4%     | 6%  | 17%       | 4%        | 7%  | 15%       | 0%       | 2%  | 4%        | 1%        | 1%  | 8%        | 1%       | 3%  | 0%        | 0%        | 0%  | 6%        |
| Miyazaki          | 3%   | 4%  | 12%       | 4%    | 5%  | 7%        | 8%    | 7%  | 19%       | 9%     | 9%  | 17%       | 3%        | 5%  | 11%       | 2%       | 0%  | 10%       | 0%        | 2%  | 7%        | 2%       | 3%  | 8%        | 1%        | 3%  | 3%        |
| Kagoshima         | 5%   | 10% | 20%       | 3%    | 4%  | 7%        | 10%   | 18% | 29%       | 22%    | 26% | 34%       | 20%       | 10% | 24%       | 2%       | 3%  | 8%        | 1%        | 3%  | 8%        | 2%       | 6%  | 8%        | 0%        | 3%  | 11%       |
| Okinawa           | 20%  | 26% | 32%       | 22%   | 19% | 26%       | 27%   | 32% | 37%       | 41%    | 34% | 40%       | 32%       | 31% | 35%       | 16%      | 19% | 27%       | 16%       | 28% | 20%       | 15%      | 14% | 27%       | 10%       | 17% | 20%       |
| None of the above | 3%   | 3%  | 2%        | 9%    | 8%  | 7%        | 2%    | 1%  | 0%        | 5%     | 4%  | 2%        | 5%        | 2%  | 1%        | 2%       | 1%  | 1%        | 2%        | 3%  | 2%        | 2%       | 1%  | 3%        | 1%        | 0%  | 3%        |

Notes: 1 This question asked the respondents which, of the tourist areas they said they "knew of" in response to the previous question, they would actually wish to visit.

2 The top 5 items are indicated in red, orange or yellow.

20. Respondents desiring to visit Japan “What makes you want to visit Japan in future?”

◆ **Motivations include interest in visiting a World Heritage Site, as well as in “nature and scenery,” “Japanese food” and “hot springs.”**

• As reasons for their interest in visiting Japan, respondents did not only cite the “nature and scenery,” Japanese food,” and “hot springs” which ranked highly in the last survey. Those who had never been to Japan were also highly interested in “visiting a World Heritage Site.” The percentage who chose this answer rose significantly since the previous survey (2013: 34% → 2014: 43% among all those who had never been to Japan), pointing to the effect of Mt. Fuji’s designation as a World Heritage Site in June 2013. Interest was especially strong among respondents from Indonesia, Malaysia and Thailand.

(Multiple responses)

| Reason / Visited in past?                               | All  |      | Korea |     | China |     | Taiwan |     | Hong Kong |     | Thailand |     | Singapore |     | Malaysia |     | Indonesia |     |
|---|------|------|-------|-----|-------|-----|--------|-----|-----------|-----|----------|-----|-----------|-----|----------|-----|-----------|-----|
|   | No   | Yes  | No    | Yes | No    | Yes | No     | Yes | No        | Yes | No       | Yes | No        | Yes | No       | Yes | No        | Yes |
| Sample size   | 1159 | 1027 | 62    | 66  | 93    | 182 | 108    | 246 | 91        | 238 | 172      | 114 | 187       | 96  | 237      | 56  | 209       | 29  |
| Interest in Japan's nature and scenery                  | 69%  | 53%  | 47%   | 42% | 71%   | 56% | 56%    | 52% | 59%       | 47% | 73%      | 57% | 65%       | 59% | 78%      | 57% | 76%       | 72% |
| Interest in Japanese food                               | 60%  | 59%  | 35%   | 45% | 59%   | 49% | 58%    | 54% | 70%       | 66% | 67%      | 67% | 53%       | 69% | 61%      | 57% | 62%       | 66% |
| Interest in Japanese hot springs                        | 57%  | 53%  | 53%   | 45% | 63%   | 59% | 53%    | 50% | 53%       | 50% | 65%      | 55% | 54%       | 50% | 59%      | 54% | 51%       | 62% |
| Interest in Japanese culture and history                | 52%  | 43%  | 29%   | 29% | 42%   | 45% | 46%    | 46% | 37%       | 33% | 56%      | 55% | 46%       | 45% | 62%      | 48% | 61%       | 76% |
| High level of safety                                    | 39%  | 49%  | 21%   | 36% | 34%   | 42% | 50%    | 59% | 32%       | 46% | 45%      | 60% | 30%       | 45% | 48%      | 50% | 37%       | 41% |
| Desire to shop in Japan                                 | 39%  | 44%  | 21%   | 29% | 48%   | 53% | 34%    | 39% | 42%       | 47% | 41%      | 42% | 39%       | 41% | 37%      | 41% | 41%       | 48% |
| Interest in Japan's World Heritage Sites                | 43%  | 34%  | 21%   | 21% | 39%   | 30% | 38%    | 35% | 31%       | 30% | 46%      | 50% | 24%       | 35% | 56%      | 38% | 57%       | 48% |
| Interest in Japanese railroads                          | 40%  | 26%  | 21%   | 9%  | 24%   | 22% | 37%    | 31% | 22%       | 21% | 46%      | 33% | 32%       | 22% | 43%      | 39% | 58%       | 66% |
| Interest in Japanese fashion, games or anime            | 32%  | 28%  | 19%   | 27% | 41%   | 40% | 25%    | 19% | 30%       | 30% | 27%      | 25% | 34%       | 22% | 37%      | 38% | 35%       | 28% |
| Nonstop flights available                               | 28%  | 31%  | 11%   | 15% | 24%   | 29% | 36%    | 42% | 25%       | 29% | 32%      | 40% | 23%       | 21% | 32%      | 21% | 31%       | 38% |
| Interest in Japanese science and technology             | 34%  | 23%  | 11%   | 14% | 29%   | 32% | 13%    | 14% | 16%       | 19% | 46%      | 33% | 22%       | 21% | 42%      | 34% | 53%       | 62% |
| Recommendation of friend or acquaintance                | 25%  | 23%  | 27%   | 15% | 32%   | 32% | 22%    | 25% | 15%       | 19% | 21%      | 22% | 32%       | 16% | 33%      | 20% | 18%       | 34% |
| Low-cost carrier available                              | 26%  | 17%  | 10%   | 14% | 12%   | 14% | 15%    | 13% | 14%       | 13% | 38%      | 34% | 16%       | 10% | 38%      | 32% | 36%       | 34% |
| Short length of journey                                 | 19%  | 24%  | 29%   | 35% | 34%   | 24% | 30%    | 33% | 19%       | 19% | 26%      | 24% | 9%        | 10% | 16%      | 20% | 11%       | 14% |
| TV advertisement  | 24%  | 15%  | 18%   | 12% | 20%   | 26% | 15%    | 12% | 9%        | 4%  | 28%      | 22% | 27%       | 20% | 27%      | 14% | 31%       | 28% |
| Article in newspaper or magazine                        | 20%  | 16%  | 11%   | 11% | 8%    | 18% | 22%    | 17% | 13%       | 12% | 24%      | 25% | 18%       | 13% | 24%      | 20% | 25%       | 21% |
| Low prices  | 16%  | 18%  | 10%   | 9%  | 14%   | 9%  | 14%    | 13% | 32%       | 31% | 24%      | 24% | 12%       | 15% | 14%      | 16% | 13%       | 21% |
| Internet advertisement; good reviews on blogs or social | 18%  | 15%  | 13%   | 11% | 18%   | 22% | 16%    | 11% | 15%       | 11% | 12%      | 18% | 10%       | 6%  | 18%      | 14% | 33%       | 52% |
| Recommendation of family member                         | 15%  | 16%  | 13%   | 8%  | 19%   | 17% | 19%    | 20% | 9%        | 16% | 11%      | 14% | 17%       | 13% | 16%      | 13% | 17%       | 24% |
| Japanese tourism campaign                               | 12%  | 11%  | 2%    | 3%  | 4%    | 11% | 4%     | 5%  | 14%       | 13% | 9%       | 14% | 12%       | 9%  | 16%      | 16% | 20%       | 41% |
| Interest in Japanese sports                             | 9%   | 9%   | 6%    | 6%  | 16%   | 12% | 2%     | 6%  | 5%        | 7%  | 8%       | 10% | 6%        | 4%  | 11%      | 14% | 13%       | 31% |
| Other   | 1%   | 1%   | 2%    | 2%  | 0%    | 0%  | 2%     | 0%  | 0%        | 0%  | 1%       | 3%  | 2%        | 3%  | 0%       | 2%  | 0%        | 3%  |

|   |   |     |   |     |   |     |   |     |   |     |   |     |   |     |   |     |   |     |
|---|---|-----|---|-----|---|-----|---|-----|---|-----|---|-----|---|-----|---|-----|---|-----|
| Liking for a Japanese region or city I have visited in the past     | - | 36% | - | 32% | - | 22% | - | 39% | - | 36% | - | 50% | - | 36% | - | 36% | - | 41% |
| Desire to visit a Japanese region or city I have not been to before | - | 42% | - | 30% | - | 24% | - | 50% | - | 40% | - | 48% | - | 50% | - | 46% | - | 59% |

Notes: 1 This question was directed as respondents who answered “Japan” to Question 2, “Where would you like to go on a foreign holiday?”, and asked what influenced them in their choice of Japan as a destination.

2 The top five items are indicated in red or yellow.



21. **Respondents desiring to visit Japan** “How would you like to travel on a future trip to Japan?”

◆ **Respondents look for long stays and independent travel.**

- Guided package tours remain popular, especially among those who have never been to Japan. However, repeat visitors from Singapore, Hong Kong, Thailand and elsewhere showed a preference for plenty of free activity on their trips.
- The answers to Question 6, “How did you arrange for hotel/inn accommodations on your last trip to Japan?”, also point to a liking for longer stays in Japan. Measures are needed that will answer visitors’ desire for longer stays by opening up opportunities for travel, lodging and consumption throughout the country.

Desired mode of travel on a future trip to Japan

(Single response)

| Respondents   | All  |      | Korea |     | China |     | Taiwan |     | Hong Kong |     | Thailand |     | Singapore |     | Malaysia |     | Indonesia |     |
|---|------|------|-------|-----|-------|-----|--------|-----|-----------|-----|----------|-----|-----------|-----|----------|-----|-----------|-----|
|   | No   | Yes  | No    | Yes | No    | Yes | No     | Yes | No        | Yes | No       | Yes | No        | Yes | No       | Yes | No        | Yes |
| Sample size   | 1159 | 1027 | 62    | 66  | 93    | 182 | 108    | 246 | 91        | 238 | 172      | 114 | 187       | 96  | 237      | 56  | 209       | 29  |
| Guided package tour (no free activity)  | 24%  | 25%  | 26%   | 20% | 19%   | 31% | 31%    | 33% | 14%       | 18% | 27%      | 28% | 17%       | 8%  | 20%      | 27% | 33%       | 45% |
| Guided package tour (with free activity)  | 36%  | 22%  | 26%   | 17% | 33%   | 24% | 40%    | 27% | 21%       | 16% | 38%      | 23% | 36%       | 22% | 42%      | 20% | 38%       | 28% |
| Package including airfare and hotels only                                       | 19%  | 24%  | 27%   | 27% | 25%   | 21% | 19%    | 21% | 33%       | 33% | 20%      | 14% | 17%       | 22% | 14%      | 25% | 14%       | 21% |
| Separate arrangements for airfare and hotels                                    | 18%  | 26%  | 16%   | 26% | 20%   | 20% | 6%     | 18% | 32%       | 32% | 13%      | 31% | 28%       | 47% | 21%      | 29% | 11%       | 3%  |
| Purchased airline tickets prior to trip; made hotel arrangements at destination | 3%   | 3%   | 5%    | 11% | 2%    | 4%  | 5%     | 1%  | 0%        | 1%  | 2%       | 4%  | 2%        | 1%  | 4%       | 0%  | 3%        | 3%  |

Desired length of stay on a future trip to Japan

| Respondents                      | All  | Korea | China | Taiwan | Hong Kong | Thailand | Singapore | Malaysia | Indonesia |
|----------------------------------|------|-------|-------|--------|-----------|----------|-----------|----------|-----------|
| Sample size                      | 2186 | 128   | 275   | 354    | 329       | 286      | 283       | 293      | 238       |
| Average length of stay (in days) | 8.0  | 5.7   | 7.7   | 6.4    | 8.5       | 7.4      | 9.5       | 9.0      | 8.4       |
| 1-3                              | 3%   | 26%   | 3%    | 3%     | 0%        | 3%       | 0%        | 1%       | 3%        |
| 4-5                              | 28%  | 50%   | 24%   | 48%    | 30%       | 34%      | 10%       | 13%      | 23%       |
| 6-7                              | 35%  | 15%   | 38%   | 35%    | 43%       | 40%      | 31%       | 33%      | 36%       |
| 8-9                              | 8%   | 1%    | 10%   | 5%     | 6%        | 4%       | 11%       | 16%      | 5%        |
| 10 or more                       | 26%  | 9%    | 24%   | 9%     | 21%       | 20%      | 48%       | 37%      | 33%       |

Notes: 1 This question was directed as respondents who answered “Japan” to Question 2, “Where would you like to go on a foreign holiday?”, and asked about their preferred mode of travel.

2 Ranking is indicated by a color scale: Lowest ←→ Highest

**Respondents desiring to visit Japan**

22. Thoughts about lodgings and hot springs bathing on a future trip to Japan

◆ **Traditional inns rate high among respondents wanting to visit Japan.**

- For Question 6, “How did you arrange for hotel/inn accommodations on your last trip to Japan?”, respondents who said they had stayed at a traditional inn (ryokan) were roughly equal in number to those who reported staying at a luxury hotel or an inexpensive hotel. On a future trip, however, an overwhelming percentage said they hoped to stay at a ryokan.
- Over 50 percent of respondents desiring to visit Japan gave a positive answer (“definitely”) when asked if they would like to bathe in a communal bath. While the custom of communal bathing is uncommon in Asia, interest in Japanese hot springs is clearly strong (as indicated in the answers to Question 20), and many want to try it for themselves. A good number of these said they would be more willing if allowed to wear a bathing suit or other covering.

Lodgings on a future trip to Japan

(Multiple responses)

| Respondents  | All  |      | Korea |     | China |     | Taiwan |     | Hong Kong |     | Thailand |     | Singapore |     | Malaysia |     | Indonesia |     |  |
|--|------|------|-------|-----|-------|-----|--------|-----|-----------|-----|----------|-----|-----------|-----|----------|-----|-----------|-----|--|
|  | No   | Yes  | No    | Yes | No    | Yes | No     | Yes | No        | Yes | No       | Yes | No        | Yes | No       | Yes | No        | Yes |  |
| Visited Japan in past?                                     |      |      |       |     |       |     |        |     |           |     |          |     |           |     |          |     |           |     |  |
| Sample size  | 1159 | 1027 | 62    | 66  | 93    | 182 | 108    | 246 | 91        | 238 | 172      | 114 | 187       | 96  | 237      | 56  | 209       | 29  |  |
| Traditional inn (ryokan)                                   | 72%  | 67%  | 61%   | 55% | 73%   | 70% | 63%    | 63% | 59%       | 64% | 73%      | 74% | 79%       | 72% | 75%      | 64% | 77%       | 76% |  |
| Comfortable luxury hotel                                   | 21%  | 46%  | 26%   | 35% | 47%   | 74% | 35%    | 48% | 31%       | 48% | 9%       | 15% | 28%       | 42% | 14%      | 30% | 9%        | 24% |  |
| Inexpensive lodgings with basic facilities (Western-style) | 47%  | 43%  | 52%   | 61% | 37%   | 23% | 44%    | 38% | 43%       | 40% | 51%      | 64% | 50%       | 52% | 53%      | 61% | 39%       | 41% |  |
| Youth hostel   | 15%  | 11%  | 16%   | 17% | 5%    | 7%  | 17%    | 10% | 23%       | 6%  | 9%       | 13% | 14%       | 13% | 18%      | 18% | 15%       | 28% |  |
| Other  | 0%   | 1%   | 0%    | 2%  | 0%    | 0%  | 0%     | 2%  | 1%        | 1%  | 0%       | 1%  | 1%        | 0%  | 1%       | 0%  | 0%        | 3%  |  |

Notes: 1 This question was directed as respondents who answered “Japan” to Question 2, “Where would you like to go on a foreign holiday?”, and asked what kind of facilities they hoped to stay in on a future trip.

2 Ranking is indicated by a color scale: Lowest  $\longleftrightarrow$  Highest

**Respondents desiring to visit Japan**

Baths in traditional Japanese inns are designed to be used by many people at once. How do you feel about bathing in a hot springs bath or other communal bathing facilities?

(Single response)

| Respondents   | All  | Korea | China | Taiwan | Hong Kong | Thailand | Singapore | Malaysia | Indonesia |
|---|------|-------|-------|--------|-----------|----------|-----------|----------|-----------|
| Sample size   | 2186 | 128   | 275   | 354    | 329       | 286      | 283       | 293      | 238       |
| Definitely want to bathe in a hot springs or communal bath          | 47%  | 39%   | 60%   | 43%    | 47%       | 47%      | 44%       | 39%      | 55%       |
| Would like to, but only if wearing a bathing suit or other covering | 27%  | 36%   | 25%   | 25%    | 25%       | 30%      | 29%       | 28%      | 21%       |
| Interested, but not sure I would actually go in                     | 22%  | 20%   | 12%   | 23%    | 22%       | 21%      | 22%       | 30%      | 23%       |
| Resistant to the idea   | 4%   | 5%    | 3%    | 9%     | 5%        | 2%       | 5%        | 2%       | 2%        |
| Other   | 0%   | 0%    | 0%    | 0%     | 0%        | 0%       | 0%        | 0%       | 0%        |

Notes: 1 This question was directed as respondents who answered “Japan” to Question 2, “Where would you like to go on a foreign holiday?”, and asked about their desire to bathe in a hot springs or communal bath.

2 Ranking is indicated by a color scale: Lowest  $\longleftrightarrow$  Highest

“What would you like to experience on a future trip to Japan?”

◆ **Travelers continue to be drawn by Japan’s special attractions: Japanese cuisine, cherry blossoms, snowy landscapes.**

- As in the previous survey, respondents were interested in dining, sightseeing, lodgings, and shopping, but also looked forward to bathing in hot springs, resting and relaxing, visiting amusement or theme parks, riding trains, and experiencing Japanese culture.
- Respondents from China showed little interest in “eating good, inexpensive food” or “staying in clean, reasonably priced lodgings.” But, in a finding that suggests a trend toward high-end travel, were very interested in eating Japanese food, staying in a traditional inn, and enjoying Japanese sake.

(Multiple responses)

| Respondents  | All  |      | Korea |     | China |     | Taiwan |     | Hong Kong |     | Thailand |     | Singapore |     | Malaysia |     | Indonesia |     |
|--|------|------|-------|-----|-------|-----|--------|-----|-----------|-----|----------|-----|-----------|-----|----------|-----|-----------|-----|
|  | No   | Yes  | No    | Yes | No    | Yes | No     | Yes | No        | Yes | No       | Yes | No        | Yes | No       | Yes | No        | Yes |
| Sample size  | 1159 | 1027 | 62    | 66  | 93    | 182 | 108    | 246 | 91        | 238 | 172      | 114 | 187       | 96  | 237      | 56  | 209       | 29  |
| Enjoy Japanese food                                  | 75%  | 70%  | 73%   | 76% | 69%   | 63% | 72%    | 71% | 69%       | 69% | 67%      | 70% | 76%       | 84% | 81%      | 61% | 81%       | 76% |
| View cherry blossoms                                 | 75%  | 62%  | 40%   | 38% | 71%   | 57% | 68%    | 66% | 69%       | 64% | 78%      | 68% | 78%       | 67% | 84%      | 64% | 80%       | 66% |
| View snowy landscapes                                | 69%  | 55%  | 42%   | 45% | 54%   | 42% | 67%    | 60% | 65%       | 62% | 67%      | 57% | 71%       | 55% | 82%      | 61% | 71%       | 48% |
| Enjoy nature and scenery                             | 67%  | 57%  | 60%   | 59% | 68%   | 56% | 72%    | 67% | 63%       | 52% | 53%      | 55% | 65%       | 57% | 77%      | 50% | 70%       | 41% |
| Eat good, inexpensive food                           | 69%  | 54%  | 58%   | 59% | 46%   | 37% | 69%    | 58% | 62%       | 49% | 68%      | 68% | 70%       | 65% | 80%      | 57% | 74%       | 52% |
| Bathe in hot springs                                 | 64%  | 58%  | 61%   | 56% | 61%   | 58% | 65%    | 64% | 57%       | 54% | 60%      | 59% | 67%       | 59% | 67%      | 46% | 66%       | 52% |
| View autumn leaves                                   | 64%  | 53%  | 26%   | 29% | 40%   | 37% | 61%    | 55% | 63%       | 62% | 69%      | 66% | 67%       | 57% | 79%      | 55% | 67%       | 52% |
| Rest and relax                                       | 64%  | 51%  | 47%   | 42% | 38%   | 35% | 68%    | 57% | 58%       | 55% | 66%      | 55% | 71%       | 69% | 65%      | 29% | 74%       | 59% |
| Stay at a traditional inn                            | 62%  | 52%  | 40%   | 44% | 60%   | 46% | 51%    | 55% | 47%       | 45% | 55%      | 64% | 72%       | 67% | 67%      | 45% | 73%       | 76% |
| Stay in clean, reasonably priced lodgings            | 65%  | 47%  | 63%   | 44% | 38%   | 27% | 57%    | 52% | 54%       | 47% | 69%      | 68% | 63%       | 52% | 76%      | 52% | 70%       | 45% |
| Enjoy favorite foods                                 | 53%  | 58%  | 52%   | 44% | 66%   | 61% | 67%    | 67% | 62%       | 62% | 54%      | 57% | 47%       | 47% | 52%      | 36% | 44%       | 41% |
| See historic sites and buildings                     | 62%  | 48%  | 52%   | 47% | 47%   | 41% | 64%    | 57% | 51%       | 42% | 59%      | 46% | 57%       | 52% | 71%      | 50% | 72%       | 52% |
| Ride railroads                                       | 55%  | 41%  | 29%   | 29% | 29%   | 34% | 49%    | 46% | 48%       | 42% | 65%      | 44% | 51%       | 45% | 61%      | 41% | 68%       | 52% |
| Visit a World Heritage Site                          | 53%  | 41%  | 47%   | 35% | 48%   | 32% | 43%    | 47% | 34%       | 37% | 55%      | 52% | 46%       | 45% | 64%      | 39% | 62%       | 59% |
| Go to amusement parks or theme parks                 | 50%  | 40%  | 31%   | 27% | 45%   | 40% | 49%    | 48% | 57%       | 39% | 48%      | 40% | 42%       | 39% | 57%      | 29% | 59%       | 45% |
| Visit museums to see artwork and cultural properties | 50%  | 37%  | 27%   | 24% | 38%   | 29% | 44%    | 41% | 42%       | 34% | 47%      | 39% | 47%       | 44% | 60%      | 46% | 61%       | 52% |
| Shop for food and beverages                          | 47%  | 40%  | 24%   | 33% | 40%   | 30% | 41%    | 47% | 38%       | 37% | 44%      | 45% | 51%       | 48% | 54%      | 36% | 52%       | 38% |
| Shop for clothes and accessories                     | 45%  | 38%  | 29%   | 33% | 44%   | 47% | 32%    | 30% | 36%       | 37% | 36%      | 34% | 53%       | 54% | 61%      | 38% | 43%       | 41% |
| Experience eco-friendly sightseeing areas or tours   | 50%  | 32%  | 31%   | 35% | 29%   | 25% | 37%    | 33% | 26%       | 25% | 51%      | 35% | 63%       | 50% | 65%      | 36% | 54%       | 34% |
| Drink Japanese sake                                  | 40%  | 36%  | 40%   | 39% | 53%   | 52% | 33%    | 32% | 33%       | 26% | 35%      | 32% | 44%       | 45% | 43%      | 30% | 35%       | 48% |
| Get together with friends or family                  | 44%  | 29%  | 39%   | 20% | 20%   | 12% | 39%    | 31% | 46%       | 42% | 30%      | 30% | 45%       | 34% | 49%      | 14% | 63%       | 41% |
| See modern / leading-edge architecture               | 44%  | 28%  | 18%   | 23% | 42%   | 27% | 34%    | 29% | 29%       | 24% | 47%      | 29% | 35%       | 22% | 55%      | 41% | 56%       | 41% |

Notes: 1 This question was directed as respondents who answered “Japan” to Question 2, “Where would you like to go on a foreign holiday?”, and asked about the kinds of things they hoped to experience in Japan. Listed here are the top 22 of a total of 53 choices.  
 2 The top 5 items are indicated in deep red or deep yellow; items 6 through 10 are indicated in pink or light yellow.

◆ **In addition to language issues and costs (during stay and for travel to and from Japan), radioactivity and earthquakes are sources of concern.**

- As more and more people travel to Japan, unease about language problems and costs is lessening. Concerns about radioactivity and earthquakes, however, remain very much in travelers' minds.
- This year's survey found fewer people anxious about language or prices, but little change from last year in the number of those concerned about radioactivity and earthquakes.
- A relatively large proportion of respondents from Malaysia and Indonesia, both Muslim countries, indicated concern over Japanese food.
- While the increase in inbound tourism has brought a decline in concern over transportation issues, communication concerns remain unchanged.

(Multiple responses)

| Respondents→  | All  |     |           | Korea |     |           | China |     |           | Taiwan |     |           | Hong Kong |     |           | Thailand |     |           | Singapore |     |           | Malaysia |     |           | Indonesia |     |           |
|---|------|-----|-----------|-------|-----|-----------|-------|-----|-----------|--------|-----|-----------|-----------|-----|-----------|----------|-----|-----------|-----------|-----|-----------|----------|-----|-----------|-----------|-----|-----------|
|   | 0    | 1   | 2 or more | 0     | 1   | 2 or more | 0     | 1   | 2 or more | 0      | 1   | 2 or more | 0         | 1   | 2 or more | 0        | 1   | 2 or more | 0         | 1   | 2 or more | 0        | 1   | 2 or more | 0         | 1   | 2 or more |
| Number of visits to Japan→  | 0    | 1   | 2 or more | 0     | 1   | 2 or more | 0     | 1   | 2 or more | 0      | 1   | 2 or more | 0         | 1   | 2 or more | 0        | 1   | 2 or more | 0         | 1   | 2 or more | 0        | 1   | 2 or more | 0         | 1   | 2 or more |
| Sample size   | 2133 | 851 | 1016      | 223   | 112 | 165       | 220   | 170 | 110       | 156    | 114 | 230       | 142       | 105 | 253       | 275      | 125 | 100       | 318       | 96  | 86        | 393      | 70  | 37        | 406       | 59  | 35        |
| High cost of lodging and daily needs  | 52%  | 40% | 34%       | 39%   | 32% | 39%       | 25%   | 20% | 14%       | 47%    | 39% | 36%       | 38%       | 31% | 27%       | 59%      | 54% | 53%       | 58%       | 45% | 49%       | 63%      | 57% | 46%       | 59%       | 68% | 17%       |
| Difficulty in communicating   | 49%  | 42% | 36%       | 27%   | 36% | 25%       | 44%   | 37% | 25%       | 53%    | 53% | 46%       | 58%       | 46% | 41%       | 49%      | 30% | 31%       | 56%       | 48% | 37%       | 53%      | 47% | 38%       | 51%       | 49% | 26%       |
| Concerns about health damage from radiation   | 40%  | 43% | 44%       | 72%   | 71% | 70%       | 44%   | 45% | 35%       | 35%    | 44% | 39%       | 53%       | 47% | 50%       | 23%      | 26% | 22%       | 39%       | 43% | 43%       | 43%      | 39% | 24%       | 24%       | 22% | 31%       |
| Fear of an earthquake occurring during stay   | 38%  | 36% | 38%       | 48%   | 38% | 48%       | 36%   | 44% | 34%       | 22%    | 21% | 25%       | 44%       | 36% | 46%       | 32%      | 30% | 38%       | 36%       | 35% | 36%       | 44%      | 37% | 27%       | 39%       | 51% | 54%       |
| High cost of travel   | 44%  | 31% | 27%       | 17%   | 11% | 15%       | 21%   | 21% | 14%       | 45%    | 36% | 36%       | 39%       | 27% | 25%       | 39%      | 26% | 27%       | 53%       | 42% | 43%       | 59%      | 53% | 43%       | 54%       | 63% | 26%       |
| Don't understand information on radiation safety                                      | 31%  | 33% | 33%       | 53%   | 62% | 56%       | 31%   | 29% | 29%       | 33%    | 34% | 27%       | 33%       | 41% | 34%       | 19%      | 18% | 19%       | 30%       | 26% | 30%       | 34%      | 31% | 14%       | 23%       | 20% | 26%       |
| Unsure of extent of recovery from earthquake and tsunami                              | 20%  | 22% | 21%       | 27%   | 24% | 22%       | 19%   | 24% | 13%       | 22%    | 30% | 25%       | 27%       | 24% | 22%       | 14%      | 16% | 24%       | 19%       | 15% | 19%       | 25%      | 30% | 19%       | 13%       | 14% | 20%       |
| Difficulty of using mobile phone and other communication devices (through WiFi, etc.) | 20%  | 17% | 18%       | 7%    | 9%  | 9%        | 21%   | 15% | 20%       | 18%    | 20% | 23%       | 21%       | 15% | 19%       | 19%      | 18% | 19%       | 18%       | 23% | 19%       | 21%      | 20% | 16%       | 31%       | 20% | 11%       |
| Possible illness or injury  | 19%  | 17% | 20%       | 14%   | 13% | 19%       | 13%   | 13% | 13%       | 17%    | 19% | 23%       | 14%       | 15% | 20%       | 27%      | 14% | 23%       | 14%       | 16% | 13%       | 24%      | 36% | 22%       | 19%       | 25% | 29%       |
| Difficulty of understanding public transportation network and its use                 | 22%  | 16% | 14%       | 11%   | 13% | 12%       | 11%   | 5%  | 6%        | 24%    | 23% | 14%       | 25%       | 15% | 16%       | 21%      | 13% | 18%       | 21%       | 26% | 12%       | 26%      | 21% | 14%       | 29%       | 29% | 20%       |
| Difficulty of coordinating vacation time with traveling companions                    | 17%  | 14% | 12%       | 9%    | 15% | 12%       | 18%   | 8%  | 5%        | 14%    | 16% | 14%       | 8%        | 6%  | 8%        | 27%      | 22% | 22%       | 16%       | 15% | 8%        | 14%      | 13% | 14%       | 21%       | 17% | 26%       |
| Couldn't find tour offering suitable departure date, course, price, etc.              | 17%  | 12% | 11%       | 6%    | 13% | 11%       | 13%   | 11% | 10%       | 22%    | 11% | 12%       | 16%       | 10% | 13%       | 19%      | 13% | 8%        | 19%       | 11% | 12%       | 21%      | 19% | 8%        | 18%       | 10% | 14%       |
| Difficulty of making reservations / applications                                      | 16%  | 13% | 8%        | 4%    | 4%  | 7%        | 25%   | 22% | 19%       | 8%     | 10% | 6%        | 7%        | 10% | 4%        | 15%      | 6%  | 10%       | 7%        | 8%  | 2%        | 16%      | 19% | 8%        | 32%       | 36% | 26%       |
| Lack of a traveling companion   | 14%  | 9%  | 9%        | 3%    | 2%  | 4%        | 9%    | 5%  | 5%        | 17%    | 15% | 13%       | 18%       | 12% | 13%       | 17%      | 10% | 8%        | 12%       | 7%  | 6%        | 14%      | 14% | 8%        | 19%       | 10% | 9%        |
| Personal safety   | 15%  | 8%  | 6%        | 14%   | 6%  | 8%        | 23%   | 10% | 15%       | 6%     | 5%  | 3%        | 9%        | 8%  | 7%        | 16%      | 11% | 5%        | 12%       | 5%  | 3%        | 14%      | 13% | 0%        | 18%       | 10% | 17%       |
| May not like food   | 13%  | 10% | 5%        | 4%    | 7%  | 3%        | 12%   | 11% | 13%       | 8%     | 11% | 4%        | 3%        | 6%  | 2%        | 12%      | 6%  | 8%        | 4%        | 3%  | 2%        | 15%      | 13% | 8%        | 29%       | 27% | 20%       |
| Few places to use my credit cards   | 11%  | 8%  | 8%        | 5%    | 3%  | 12%       | 12%   | 8%  | 9%        | 12%    | 10% | 7%        | 6%        | 4%  | 6%        | 9%       | 11% | 9%        | 11%       | 7%  | 7%        | 10%      | 13% | 11%       | 15%       | 19% | 14%       |
| Few places to change money  | 10%  | 10% | 9%        | 3%    | 2%  | 4%        | 6%    | 8%  | 14%       | 8%     | 13% | 7%        | 8%        | 7%  | 9%        | 8%       | 13% | 14%       | 6%        | 11% | 7%        | 11%      | 16% | 11%       | 19%       | 15% | 9%        |
| Few places to use cash card from my home bank   | 10%  | 8%  | 8%        | 3%    | 4%  | 9%        | 9%    | 11% | 9%        | 11%    | 8%  | 7%        | 6%        | 5%  | 5%        | 8%       | 9%  | 16%       | 10%       | 4%  | 2%        | 11%      | 11% | 5%        | 17%       | 12% | 17%       |
| Persuaded by others not to go   | 9%   | 9%  | 8%        | 13%   | 18% | 13%       | 12%   | 5%  | 8%        | 4%     | 6%  | 3%        | 11%       | 11% | 9%        | 3%       | 6%  | 7%        | 7%        | 5%  | 5%        | 9%       | 7%  | 8%        | 12%       | 19% | 11%       |
| May not adjust to unfamiliar customs  | 9%   | 8%  | 6%        | 5%    | 2%  | 3%        | 16%   | 14% | 11%       | 10%    | 11% | 7%        | 5%        | 4%  | 3%        | 13%      | 9%  | 12%       | 6%        | 3%  | 2%        | 10%      | 14% | 0%        | 8%        | 8%  | 11%       |
| Lack of understanding or consideration for my faith                                   | 10%  | 7%  | 5%        | 3%    | 4%  | 4%        | 9%    | 10% | 8%        | 1%     | 4%  | 3%        | 4%        | 3%  | 4%        | 8%       | 6%  | 10%       | 8%        | 0%  | 2%        | 15%      | 10% | 5%        | 17%       | 22% | 11%       |
| Journey to Japan is too long  | 8%   | 4%  | 4%        | 1%    | 1%  | 2%        | 8%    | 6%  | 11%       | 3%     | 4%  | 2%        | 4%        | 1%  | 4%        | 7%       | 5%  | 7%        | 7%        | 1%  | 3%        | 8%       | 6%  | 3%        | 15%       | 5%  | 6%        |
| Afraid to fly   | 4%   | 4%  | 2%        | 2%    | 1%  | 3%        | 5%    | 3%  | 3%        | 3%     | 7%  | 2%        | 4%        | 3%  | 1%        | 5%       | 3%  | 4%        | 3%        | 4%  | 2%        | 4%       | 4%  | 3%        | 2%        | 3%  | 6%        |
| Other   | 2%   | 1%  | 1%        | 1%    | 1%  | 2%        | 2%    | 1%  | 0%        | 3%     | 1%  | 2%        | 1%        | 1%  | 1%        | 1%       | 1%  | 1%        | 3%        | 1%  | 3%        | 1%       | 1%  | 3%        | 1%        | 2%  | 0%        |

Notes: 1 The top 5 items are indicated in red, orange or yellow.

2 To prevent bias, respondents were asked about the March 2011 earthquake in a subsequent question.

25. **All respondents**

Concerns: "Did the March 2011 earthquake change your mind about traveling to Japan?"

◆ **Feelings least affected in regions farthest from Japan.**

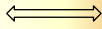
- Respondents from Korea and Hong Kong indicated a reluctance to visit Japan since the earthquake. This sentiment was shared by only a small percentage of those from Thailand and Taiwan.
- The percentage of respondents from East Asia (Korea, China, Taiwan and Hong Kong) who said the earthquake had made them reluctant to visit Japan fell off somewhat since last year's survey, although it did remain high. Among respondents from Southeast Asia (Thailand, Singapore, Malaysia and Indonesia), however, the percentage was essentially unchanged.
- The more distant a region is from Japan, the less it is likely to receive the most recent information on the earthquake's aftermath. Thus it remains vital to send out accurate information as widely as possible, so that travelers can be assured of the safety of travel in Japan.

Impact of the 2011 earthquake on feelings about traveling to Japan (compared to previous year)

(Single response)

| Respondents→<br>Sample size   | All         |             | Korea       |             | China       |             | Taiwan      |             | Hong Kong   |             | Thailand    |             | Singapore   |             | Malaysia    |             | Indonesia   |             |
|---|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|
|   | 4000        | 4000        | 500         | 500         | 500         | 500         | 500         | 500         | 500         | 500         | 500         | 500         | 500         | 500         | 500         | 500         | 500         | 500         |
|   | 2013 survey | 2014 survey | 2013 survey | 2014 survey | 2013 survey | 2014 survey | 2013 survey | 2014 survey | 2013 survey | 2014 survey | 2013 survey | 2014 survey | 2013 survey | 2014 survey | 2013 survey | 2014 survey | 2013 survey | 2014 survey |
| Have been reluctant to visit Japan since the 2011 earthquake                                  | 25%         | 23%         | 51%         | 45%         | 25%         | 17%         | 13%         | 8%          | 42%         | 40%         | 7%          | 8%          | 29%         | 32%         | 21%         | 21%         | 16%         | 16%         |
| Was reluctant to visit Japan immediately after the earthquake, but would be willing to go now | 32%         | 34%         | 23%         | 25%         | 45%         | 49%         | 27%         | 31%         | 30%         | 29%         | 30%         | 32%         | 29%         | 26%         | 27%         | 33%         | 42%         | 45%         |
| Have no reluctance to visit Japan, regardless of the earthquake                               | 37%         | 39%         | 14%         | 23%         | 24%         | 29%         | 50%         | 53%         | 26%         | 28%         | 61%         | 58%         | 39%         | 39%         | 48%         | 44%         | 32%         | 34%         |
| Have no desire to visit Japan, regardless of the earthquake                                   | 6%          | 5%          | 13%         | 7%          | 6%          | 5%          | 10%         | 8%          | 2%          | 2%          | 2%          | 2%          | 4%          | 3%          | 3%          | 3%          | 10%         | 5%          |

Note: Ranking is indicated by a color scale:

Lowest  Highest

26. **All respondents**

“Do you know which country and city will host upcoming Olympic Games?”

◆ **Interest in upcoming Olympics is high in China, but low overall.**

- With the 2016 Rio de Janeiro Olympics coming up in just two years, when asked about the location over half the respondents said they didn't know or didn't care. The results were the same for the 2018 games in Pyeongchang, Korea and the 2020 games in Tokyo.
- Chinese respondents showed the strongest interest in the Olympics overall, followed by Indonesia and Thailand.

2016 Summer Olympics (Rio de Janeiro, Brazil)

(Single response)

| Respondents                 | All  |        | Korea |        | China |        | Taiwan |        | Hong Kong |        | Thailand |        | Singapore |        | Malaysia |        | Indonesia |        |
|-----------------------------|------|--------|-------|--------|-------|--------|--------|--------|-----------|--------|----------|--------|-----------|--------|----------|--------|-----------|--------|
|                             | Male | Female | Male  | Female | Male  | Female | Male   | Female | Male      | Female | Male     | Female | Male      | Female | Male     | Female | Male      | Female |
| Sample size                 | 2002 | 1998   | 251   | 249    | 234   | 266    | 275    | 225    | 229       | 271    | 256      | 244    | 251       | 249    | 248      | 252    | 258       | 242    |
| Know both country and city  | 21%  | 14%    | 16%   | 8%     | 48%   | 47%    | 19%    | 6%     | 17%       | 12%    | 16%      | 9%     | 17%       | 7%     | 17%      | 8%     | 21%       | 12%    |
| Know country                | 20%  | 18%    | 18%   | 17%    | 21%   | 19%    | 17%    | 11%    | 16%       | 14%    | 30%      | 24%    | 16%       | 16%    | 23%      | 21%    | 21%       | 22%    |
| Know city                   | 5%   | 5%     | 6%    | 3%     | 5%    | 5%     | 2%     | 2%     | 4%        | 2%     | 5%       | 4%     | 6%        | 5%     | 5%       | 6%     | 10%       | 9%     |
| Don't know / not interested | 53%  | 63%    | 59%   | 71%    | 26%   | 29%    | 61%    | 80%    | 63%       | 71%    | 49%      | 64%    | 62%       | 72%    | 55%      | 65%    | 48%       | 57%    |

2018 Winter Olympics (Pyeongchang, Korea)

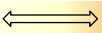
(Single response)

| Respondents                 | All  |        | Korea |        | China |        | Taiwan |        | Hong Kong |        | Thailand |        | Singapore |        | Malaysia |        | Indonesia |        |
|-----------------------------|------|--------|-------|--------|-------|--------|--------|--------|-----------|--------|----------|--------|-----------|--------|----------|--------|-----------|--------|
|                             | Male | Female | Male  | Female | Male  | Female | Male   | Female | Male      | Female | Male     | Female | Male      | Female | Male     | Female | Male      | Female |
| Sample size                 | 2002 | 1998   | 251   | 249    | 234   | 266    | 275    | 225    | 229       | 271    | 256      | 244    | 251       | 249    | 248      | 252    | 258       | 242    |
| Know both country and city  | 15%  | 13%    | 36%   | 30%    | 31%   | 35%    | 9%     | 5%     | 6%        | 5%     | 9%       | 7%     | 11%       | 6%     | 7%       | 6%     | 15%       | 10%    |
| Know country                | 17%  | 15%    | 10%   | 14%    | 24%   | 20%    | 16%    | 8%     | 10%       | 8%     | 21%      | 20%    | 11%       | 14%    | 21%      | 13%    | 19%       | 20%    |
| Know city                   | 5%   | 4%     | 6%    | 2%     | 3%    | 4%     | 3%     | 1%     | 3%        | 4%     | 7%       | 5%     | 7%        | 4%     | 4%       | 5%     | 8%        | 10%    |
| Don't know / not interested | 63%  | 68%    | 48%   | 54%    | 42%   | 41%    | 73%    | 86%    | 81%       | 83%    | 63%      | 68%    | 71%       | 76%    | 68%      | 76%    | 58%       | 60%    |

2020 Summer Olympics (Tokyo, Japan)

(Single response)

| Respondents                 | All  |        | Korea |        | China |        | Taiwan |        | Hong Kong |        | Thailand |        | Singapore |        | Malaysia |        | Indonesia |        |
|-----------------------------|------|--------|-------|--------|-------|--------|--------|--------|-----------|--------|----------|--------|-----------|--------|----------|--------|-----------|--------|
|                             | Male | Female | Male  | Female | Male  | Female | Male   | Female | Male      | Female | Male     | Female | Male      | Female | Male     | Female | Male      | Female |
| Sample size                 | 2002 | 1998   | 251   | 249    | 234   | 266    | 275    | 225    | 229       | 271    | 256      | 244    | 251       | 249    | 248      | 252    | 258       | 242    |
| Know both country and city  | 16%  | 12%    | 12%   | 9%     | 36%   | 36%    | 18%    | 9%     | 12%       | 9%     | 14%      | 9%     | 11%       | 6%     | 13%      | 8%     | 14%       | 9%     |
| Know country                | 16%  | 13%    | 11%   | 9%     | 23%   | 16%    | 15%    | 8%     | 12%       | 10%    | 22%      | 18%    | 12%       | 11%    | 19%      | 11%    | 17%       | 18%    |
| Know city                   | 6%   | 5%     | 6%    | 3%     | 4%    | 5%     | 3%     | 1%     | 3%        | 4%     | 6%       | 4%     | 9%        | 6%     | 6%       | 6%     | 10%       | 9%     |
| Don't know / not interested | 62%  | 70%    | 72%   | 80%    | 37%   | 43%    | 64%    | 81%    | 72%       | 77%    | 58%      | 70%    | 68%       | 77%    | 62%      | 75%    | 58%       | 64%    |

Note: Ranking is indicated by a color scale:  Lowest  $\longleftrightarrow$  Highest



27. **Selected countries** “Are you aware of the measures implemented in July 2013 to make it easier to obtain a Japanese visa or visa exemption?”

◆ **Easing of visa requirements has led to new interest in visiting Japan.**

- Respondents from all countries were highly aware of the easing of visa requirements. Only a few said that while they were aware of the changes, they still had no interest in visiting Japan. Some 80 percent of respondents from Thailand and Malaysia, for whom visa requirements were waived, and 86 percent of those from Indonesia, for whom regulations were eased, said they knew of the changes and had either been to Japan or wanted to go.
- Interest in visiting Japan was especially high among those who had not yet been there.

Visa waivers (Thailand, Malaysia)

(Single response)

| Respondents→   | All |     |           |  | Thailand |     |           | Malaysia |     |           |
|--|-----|-----|-----------|--|----------|-----|-----------|----------|-----|-----------|
|  | 0   | 1   | 2 or more | (Reference)<br>All respondents, regardless of number of visits | 0        | 1   | 2 or more | 0        | 1   | 2 or more |
| Number of past visits to Japan→                                |     |     |           |  |          |     |           |          |     |           |
| Sample size  | 668 | 195 | 137       | 1000   | 275      | 125 | 100       | 393      | 70  | 37        |
| Know of measures; visited Japan after visa waivers took effect | 0%  | 31% | 45%       | 80%  | 0%       | 33% | 46%       | 0%       | 29% | 41%       |
| Know of measures; hope to visit Japan in future                | 72% | 62% | 51%       |  | 86%      | 64% | 50%       | 63%      | 57% | 54%       |
| Know of measures but not interested in visiting Japan          | 6%  | 1%  | 2%        | 5%   | 5%       | 1%  | 3%        | 6%       | 1%  | 0%        |
| Don't know / don't care  | 22% | 6%  | 2%        | 16%  | 9%       | 2%  | 1%        | 31%      | 13% | 5%        |

Easing of visa regulations (Indonesia)

(Single response)

| Respondents  | Indonesia |     |           |  |
|--|-----------|-----|-----------|--|
|  | 0         | 1   | 2 or more | (Reference)<br>All respondents, regardless of number of visits |
| Number of past visits to Japan                               |           |     |           |  |
| Sample size  | 406       | 59  | 35        | 500  |
| Know of measures; visited Japan after regulations were eased | 0%        | 34% | 57%       | 86%  |
| Know of measures; hope to visit Japan in future              | 85%       | 59% | 31%       |  |
| Know of measures but not interested in visiting Japan        | 2%        | 0%  | 0%        | 1%   |
| Don't know / don't care                                      | 13%       | 7%  | 11%       | 12%  |

Note: Ranking is indicated by a color scale: Lowest ←→ Highest

Reference: Easing of visa requirements

| Traveler's nationality | Measures prior to July 1, 2013 | Easing measures (Implemented July 1, 2013)                                    | Approx. number of foreign visitors to Japan (Of which, tourists) |                   |
|------------------------|--------------------------------|---|--|-------------------|
|                        |                                |   | 2012   | 2013              |
| Thailand               | Multiple entry visa            | Visa waiver   | 260,000 (200,000)  | 450,000 (400,000) |
| Malaysia               | Multiple entry visa            | Visa waiver   | 130,000 (100,000)  | 180,000 (140,000) |
| Indonesia              | Multiple entry visa            | Extension of length of stay for multiple entry visa (from 15 days to 30 days) | 100,000 (70,000)   | 140,000 (100,000) |

\* Multiple entry visa: Traveler can enter Japan any number of times during the 3-year period of validity.

Source: Prepared by DBJ based on material from the Ministry of Foreign Affairs website and the Japan National Tourist Organization.



28. **All respondents**

Free answer: "What would you like to eat and drink in Japan?"

◆ **Sake joins sushi and ramen on list of popular food and drink.**

- This year’s survey contained a new, free-response question asking what the respondents would like to eat and drink on a trip to Japan.
- In addition to such traditional Japanese foods as sushi, sashimi and tempura, the respondents showed a liking for ramen, udon, soba and other noodle dishes.
- Sake was also highly popular, as were crab and other seafood. Fruit came in high on the list as well. The results pointed to the popularity of a wide variety of Japanese food and the products of its farms and fisheries.

| Country   | Item         | 1     | 2       | 3       | 4       | 5       | 6       |
|-----------|--------------|-------|---------|---------|---------|---------|---------|
| Korea     | Word         | Sushi | Ramen   | Udon    | Sake    | Beer    | Soba    |
|           | Actual       | 213   | 107     | 91      | 45      | 22      | 15      |
|           | %            | 42.6% | 21.4%   | 18.2%   | 9.0%    | 4.4%    | 3.0%    |
| China     | Word         | Sushi | Sake    | Sashimi | Seafood | Beef    | Ramen   |
|           | Actual count | 192   | 116     | 96      | 46      | 25      | 21      |
|           | %            | 38.4% | 23.2%   | 19.2%   | 9.2%    | 5.0%    | 4.2%    |
| Taiwan    | Word         | Ramen | Sushi   | Sake    | Sashimi | Seafood | Crab    |
|           | Actual count | 148   | 94      | 83      | 72      | 36      | 24      |
|           | %            | 29.6% | 18.8%   | 16.6%   | 14.4%   | 7.2%    | 4.8%    |
| Hong Kong | Word         | Sushi | Sashimi | Ramen   | Sake    | Seafood | Fruit   |
|           | Actual count | 138   | 115     | 64      | 42      | 26      | 17      |
|           | %            | 27.6% | 23.0%   | 12.8%   | 8.4%    | 5.2%    | 3.4%    |
| Thailand  | Word         | Sushi | Sake    | Ramen   | Sashimi | Crab    | Seafood |
|           | Actual count | 100   | 93      | 52      | 49      | 26      | 14      |
|           | %            | 20.0% | 18.6%   | 10.4%   | 9.8%    | 5.2%    | 2.8%    |
| Singapore | Word         | Sushi | Sake    | Ramen   | Beef    | Seafood | Udon    |
|           | Actual count | 178   | 91      | 93      | 20      | 20      | 15      |
|           | %            | 35.6% | 18.2%   | 18.6%   | 4.0%    | 4.0%    | 3.0%    |
| Malaysia  | Word         | Sushi | Sake    | Sashimi | Ramen   | Seafood | Tempura |
|           | Actual count | 223   | 73      | 55      | 43      | 12      | 10      |
|           | %            | 44.6% | 14.6%   | 11.0%   | 8.6%    | 2.4%    | 2.0%    |
| Indonesia | Word         | Sushi | Sake    | Ramen   | Udon    | Tempura | Sashimi |
|           | Actual count | 183   | 179     | 82      | 19      | 14      | 13      |
|           | %            | 36.6% | 35.8%   | 16.4%   | 3.8%    | 2.8%    | 2.6%    |

Note: There were 500 responses per regions. Some responses included more than one word.