

PRIME Tourist Destination City Tokyo

~Tokyo Tourism Strategy Action Plan 2018~



Tokyo Tokyo Old meets New

TOKYO
METROPOLITAN
GOVERNMENT

PRIME Tourist Destination City Tokyo

～ Tokyo Tourism Strategy Action Plan 2018 ～

The objective of the Tokyo Metropolitan Government's (TMG) 2018 plan is to respond in a timely fashion to the rapid changes occurring in the tourism industry, not least the rapid increase in the number of visitors to the city, and to promote the tourism industry in a strategic and comprehensive way in the run-up to the Tokyo 2020 Olympic and Paralympic Games and beyond.

Tokyo: World-beating “PRIME Tourist Destination City”

The city's objective is to make Tokyo the top tourist destination city for travelers from around the world.

By implementing the policies outlined in this plan, Tokyo aims to provide an unrivalled tourist experience both in terms of hospitality and of the quality of the city's tourist attractions, thus attracting a greater number of domestic and international travelers to the city, and thereby increasing revenues for the industry.



Yuriko Koike,
Governor of Tokyo

Action Plan 2018 Key Points

1 Ambitious numerical targets

The Tokyo Metropolitan Government has set ambitious numerical targets that can only be achieved through the aggressive implementation of the policies in this plan. The 2018 TMG plan includes new numerical targets by inbound tourist market.

2 Six key strategies

The action plan sets six key strategies for the promotion of tourism in the city as well as defining the specific policies required for implementation.

3 Annual action plans

The action plan will be updated annually in order to respond proactively to changes in the tourism sector.

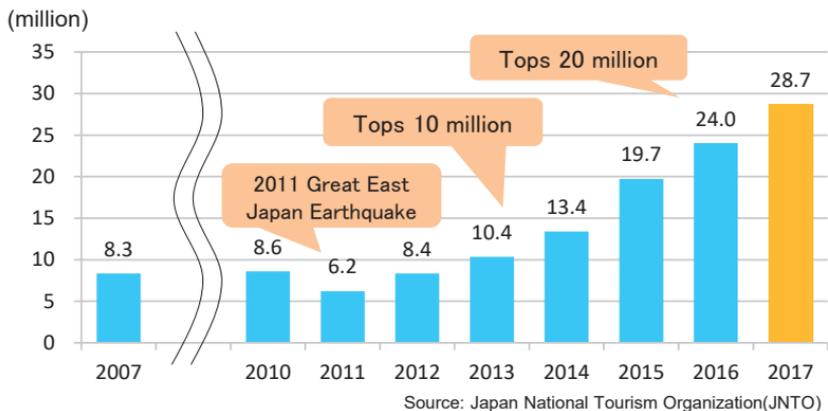
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Recent Trends in Tourism in Japan

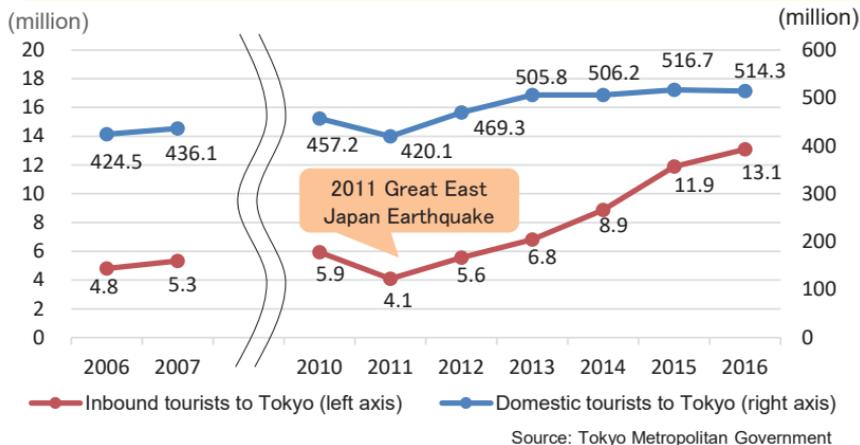
1 Number of inbound tourists to Japan

- Inbound tourists to Japan have increased **3.4 times** in the **last decade**.
- A record **28.7 million** people visited Japan in 2017.



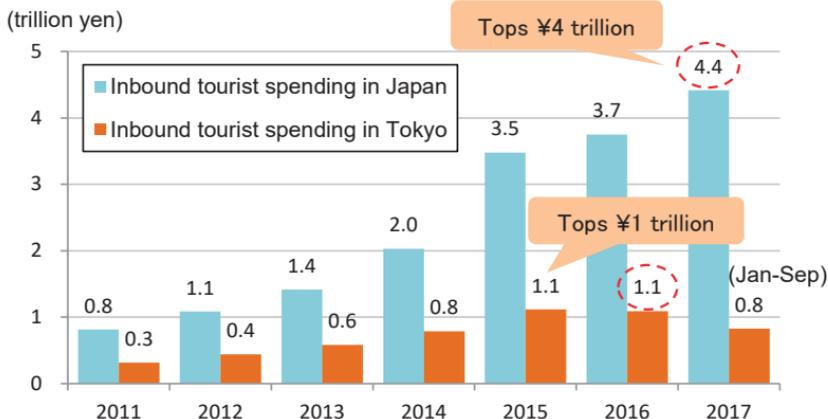
2 Number of tourists visiting Tokyo

- Inbound tourists to Tokyo have increased **2.7 times** in the **last decade**.
- Domestic tourists visits **topped 500 million**.



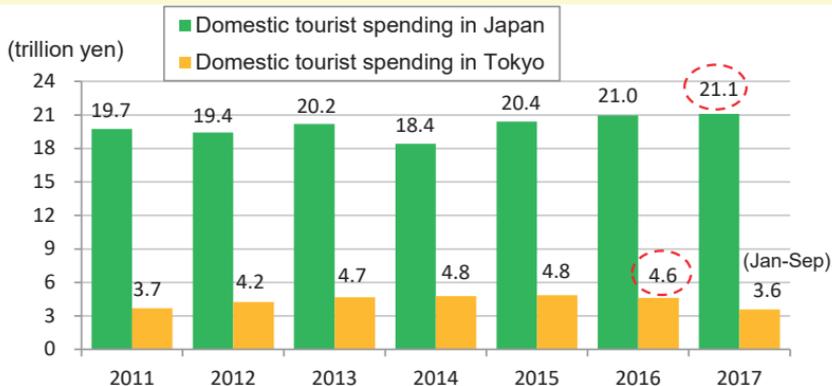
3 Inbound tourist spending

- Inbound tourists spent a **record ¥4.4 trillion** in Japan in 2017.
- Inbound tourist spending in Tokyo decreased slightly to **¥1.1 trillion** in 2016.



4 Domestic tourist spending

- Domestic tourists spent **¥21.1 trillion** in Japan in 2017.
- Domestic tourist spending in Tokyo decreased slightly to **¥4.6 trillion** in 2016.



Numerical Targets

The plan sets targets for the number of tourists visiting Tokyo, both domestic and international, and includes targets for **the number of inbound tourists by market, revenues** and **the number of repeat visits**.

Inbound tourists to Tokyo

Double the number of inbound tourists by 2020

2015 : 11.9 million → 2016 : 13.1 million → 2020 : **25 million**

Targets by market

EU, NA, AUS	2.2 million	2.6 million	EU, NA, AUS	5.0 million
East Asia	7.6 million	8.2 million	East Asia	15.5 million
Southeast Asia, India	1.6 million	1.7 million	Southeast Asia, India	3.7 million

Note: NA, AUS stands for North America, Australia respectively. The breakdowns by market are TMG estimates.

Repeat inbound tourists to Tokyo

Target a 60% repeat visit rates by 2020

2020 : **15 million**

Inbound tourist spending in Tokyo

2020 target is 2.4 times the 2015 actual, based on the growth rate of the last 5 years

2015 : ¥1.1 trillion → 2016 : ¥1.1 trillion → 2020 : **¥2.7 trillion**

Domestic tourist visits to Tokyo

Targets a new record in 2020

2015 : 516.7 million → 2016 : 514.3 million → 2020 : **600 million**

Domestic tourist spending in Tokyo

Targets a ¥1 trillion increase versus 2015

2015 : ¥4.8 trillion → 2016 : ¥4.6 trillion → 2020 : **¥6 trillion**

Tourism Industry Promotion Policies

The Tokyo Metropolitan Government will implement **six strategies** to achieve the PRIME Tourist Destination City targets.

1

Tourism management focused on increasing revenues

- Support inbound tourism businesses
- Support businesses to utilize foreign human resources

2

Improve the quality and attractiveness of tourism assets

- Leverage **waterfronts, nighttime illuminations** and **nightlife tourism**
- Promote tourism in **the Tama area and the outlying islands**

3

New focus for tourism promotion

- Promote Tokyo through the **logo** and the marketing **slogan**
- Broaden the scope of promotion to include **higher spend tourists**

4

MICE tourism

- Support for **infrastructure development** of **MICE facilities**
- Establish **one-stop service center** specialized in **unique venues**

5

Improvement of inbound tourism infrastructure

- Provide tourist information by organizing **Tokyo tourism volunteers**
- Promote **accessible tourism**

6

Co-ordination with other destinations in Japan

- **Increase the number of tie-ups with other regions in Japan**
- Promotion in **partnership** with the **Rugby World Cup 2019™** host cities

Key points

- Provide support for inbound businesses to improve their management skills and ability to respond to greater inbound tourist numbers
 - Provide support for the leverage of overseas national employees to increase sustainable inbound tourism revenues
 - Provide support for and more effective advertising of ryokan and other accommodation providers
- Provide support for inbound tourism businesses including the **introduction of ICT** to improve productivity, **multi-lingual translation**, **Wi-Fi** and **Western-style toilets**

<ICT>



ICT implementation in a restaurant kitchen

<Multi-lingual translation of signage>



<Wi-Fi>



<Western-style toilet>



- Provide support for inbound tourism businesses including the introduction of **a duty-free system** and **credit card payment devices**

<Duty-free system>



<Credit card payment devices>



- Provide support for businesses taking an internationalized approach to tourism development to **help them leverage overseas nationals including exchange students**



- Develop **the RYOKAN brand** to promote the unique charms of **Japanese-style inns** to overseas visitors



Key points

- Enhance the appeal of Tokyo as a destination city by proactively adopting new approaches to the development of tourism assets
 - Support efforts at the local level to leverage tourism assets popular with overseas visitors
 - Strengthen the promotion of tourism to the Tama area and the outlying islands
- Provide support to **increase tourism in the bay area**, including the **lighting up of buildings and landscapes**, and **projection mapping**, and to **develop nightlife tourism**

<Waterfront event at Tennozu>

<Cherry blossom illumination
at Kunitachi City>

<Projection mapping event>



<Night-time cruise>



- Provide support at the local level for the development of tourism based around globally popular **anime** and **manga**, and **promote Tokyo as a filming location**, as well as supporting the **Tokyo Anime Award Festival**

<Tokyo Anime Tourism 2018>



- Support businesses **adopting new approaches to the development of tourism assets, such as “glamping”**, in the Tama area and the outlying islands

<Glamping>



- Promote tourism in the outlying islands by **supporting sightseeing tours including spouse hunting events** and by **increasing visitor spending** through the digital currency “Shimapo” *

<Guidebook of the outlying islands>



< Digital currency “Shimapo”>



***What is the digital currency “Shimapo”?**

Travel coupon that tourists staying at the 11 outlying islands can use at affiliated stores

Key points

- Promote Tokyo as an attractive city effectively
 - Promote Tokyo to the new target countries and areas and conduct marketing campaigns in partnership with cities overseas
 - Promote Tokyo to markets which can be expected to spend more per tourist during their stay
- Market the attractiveness of Tokyo as a tourist destination using **the logo and marketing slogan**

Tokyo Tokyo Old meets New

Tokyo Tokyo Old meets New

<Tokyo PR ad>

"EXCITING" version



"UNIQUE" version



- Promote Tokyo to the **UAE** market, that has great potential as an inbound market to Tokyo

<Tokyo PR booth at a tourism convention>



"Travel Revolution 2017" at Singapore

- **Attract more wealthy overseas visitors** through targeted marketing, including at the **International Luxury Travel Market Cannes (ILTM*)**

*What is ILTM?

ILTM is globally famous for its luxury travel advisor events. ILTM Cannes is the flagship event with 3,000 attendees from all over the world.

- **Partner with top international tourist destination cities** such as Paris and New York in order to **increase inbound visitors**

<Reciprocal advertising campaign in New York>



Tokyo poster at a bus stop



The Empire State Building illumination
(C) NYC & Company/Julienne Schaar

Key points

- Improve MICE infrastructure through supporting functional improvements to venue facilities
 - Provide support for MICE events in the Tama area, outside of the city center
 - Promote programs to use art museums, gardens and other facilities in Tokyo as unique venues for meeting receptions and events
- Support the **introduction of wireless LAN, high-definition projection, simultaneous interpretation systems and other necessary equipment in MICE* venues**, such as convention centers, hotels and universities

<High-definition projection>



<Simultaneous interpretation system>

***What is MICE?**

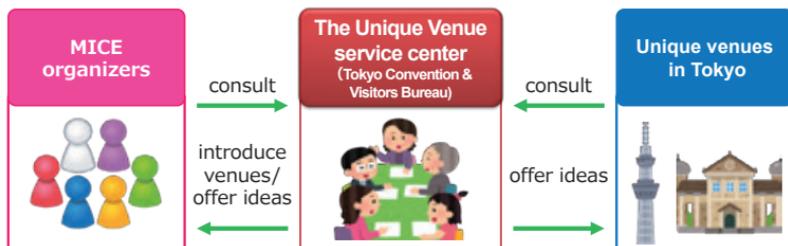
MICE stands for Meetings, Incentives, Conventions, and Exhibitions/Events

- In the **Tama area**, designate and provide assistance to areas that have the required peripheral facilities for MICE, and, by improving the infrastructure, **increase the number of MICE events in these areas**



- Establish a **new unique venue service center** to meet the requirements of MICE organizers

<The Unique Venue service center>



***What are unique venues?**

Unique venues here refer to venues, such as historic buildings and art museums, that provide a special atmosphere or environment in which to conduct meetings, events and receptions.

- Promote Tokyo's unique venues to domestic and international MICE organizers through **a website and other marketing materials**

<PR brochure>



Key points

- Improve tourist guidance services so that inbound tourists can more easily navigate the city
 - Improve provision of foreign languages to improve the tourist experience in Tokyo
 - Raise the awareness of travel businesses to improve the provision of services tailored to the diverse cultural needs and customs of inbound tourists
 - Create projects and improve social awareness so that seniors and people with disabilities can travel in Tokyo more easily
- Provide **tourist information on the street** * and tour guide services for inbound tourists by organizing **Tokyo tourism volunteers**

<Tokyo tourism volunteers>



***Areas where tourist information on the street is currently provided**

Shinjuku, Ueno, Ginza, Asakusa, Shibuya and Odaiba (to be expanded)

- Establish on a trial basis a **multi-lingual call center** for inbound tourists, and provide support for taxi businesses to introduce **tablets**

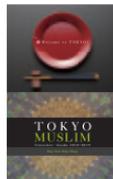


- **Hold seminars** and **dispatch experts** to travel businesses so they can accommodate diverse cultures and customs, such as halal

<Seminar on the needs of Muslim visitors>



<Brochure for Muslim visitors>



- Improve the accessibility of public transportation and raise awareness by the public and businesses in order to **promote accessible tourism***, meeting the needs of everyone including senior citizens and people with disabilities

<Enhancing the accessibility of hotels>



Eliminating steps and installing handrails

*What is accessible tourism?

Providing travel services that meet the needs of all people regardless of age, physical impediments or disabilities

- Distribute a **handbook** to Tokyo citizens to improve understanding of the needs of overseas tourists and people with disabilities

Key points

- Partner with other regions in Japan on initiatives to attract more inbound tourists
 - Work with other cities to assist them in holding MICE events, spreading the benefits of MICE events to other regions
 - Provide information on the attractions of other regions outside of Tokyo, and encourage tourists to take trips to other areas in Japan
- Expand partnerships to **attract more inbound tourists** to add **Hokuriku** to existing arrangements with Tohoku, Chugoku, Shikoku and Kyushu region
 - Promote marketing campaigns in partnership with the **Rugby World Cup 2019™ Japan host cities** to encourage inbound tourists to visit Tokyo and other regions areas in Japan

<Special website, here promoting rice paddy art in Aomori>



<Advertisement at Shibuya Station in collaboration with Chugoku and Shikoku region>



- Support **municipalities within Tokyo that tie-up with other cities** in Japan to develop their tourist industry

<Musashino City regional specialty shop>



(Musashino City)

Selling special products of friendship cities

- Strengthen a partnership with Sapporo City, Ishikawa Prefecture, Nagoya City, Kyoto City, Fukuoka City and Okinawa Prefecture to **increase incentive tour groups** by overseas businesses

<Incentive tour group>



Shrine prayer ritual experience
(Ishikawa Prefecture)



Snow activities
(Sapporo City)

- **Promote tourist destinations throughout Japan**, by holding product fairs, joint large-scale events with private companies, and through Japanese prefectural tourism corner in TMG

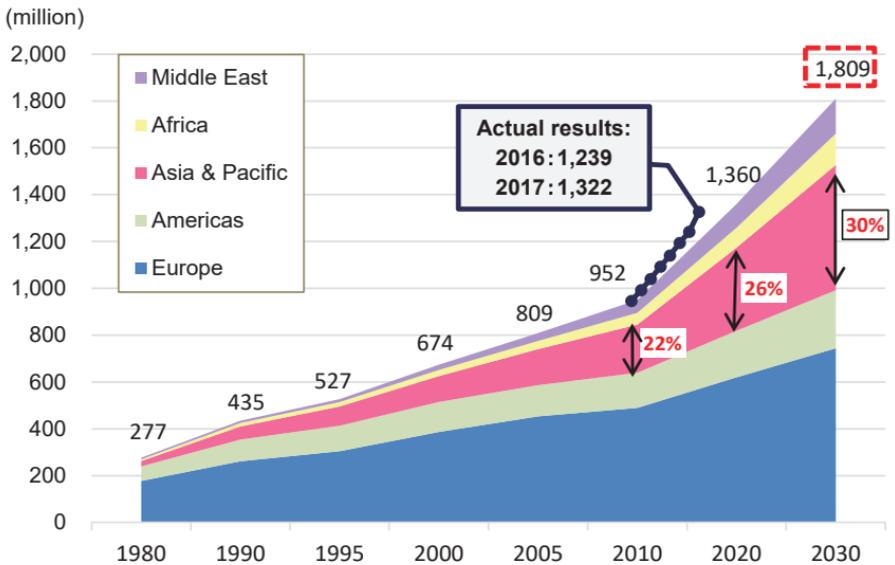
<Fair of specialty products from across Japan
at TMG Building Observation Deck>



Tourism Statistics

International tourist arrivals (including forecasts)

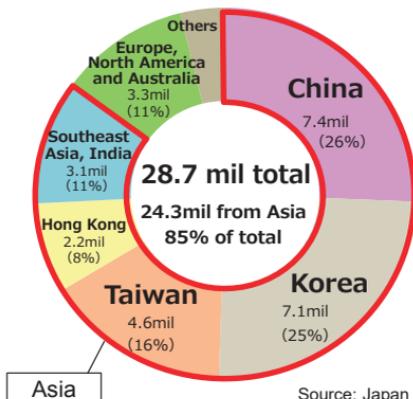
- The number of tourist arrivals worldwide exceeded **1.3 billion** in 2017, and is expected to rise to **1.8 billion** in 2030.
- Tourists visiting **Asia & Pacific** rose to for 22% in 2010, which is expected to rise to **30%** in 2030.



Source: UNWTO

Tourist arrivals in Japan by country/region (2017)

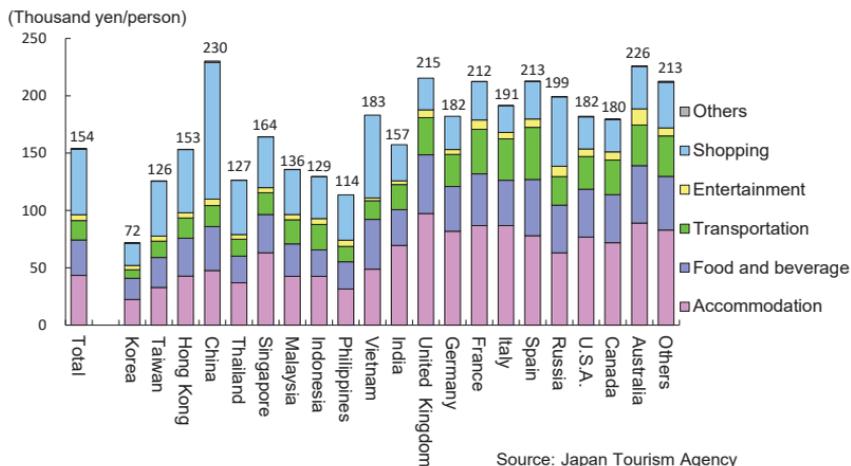
- Tourists from **Asia** accounted for **85%** of all inbound tourists to Japan in 2017, with China, Korea and Taiwan topping the list.



Source: Japan National Tourism Organization (JNTO)

Tourism spending per person by country/region (2017)

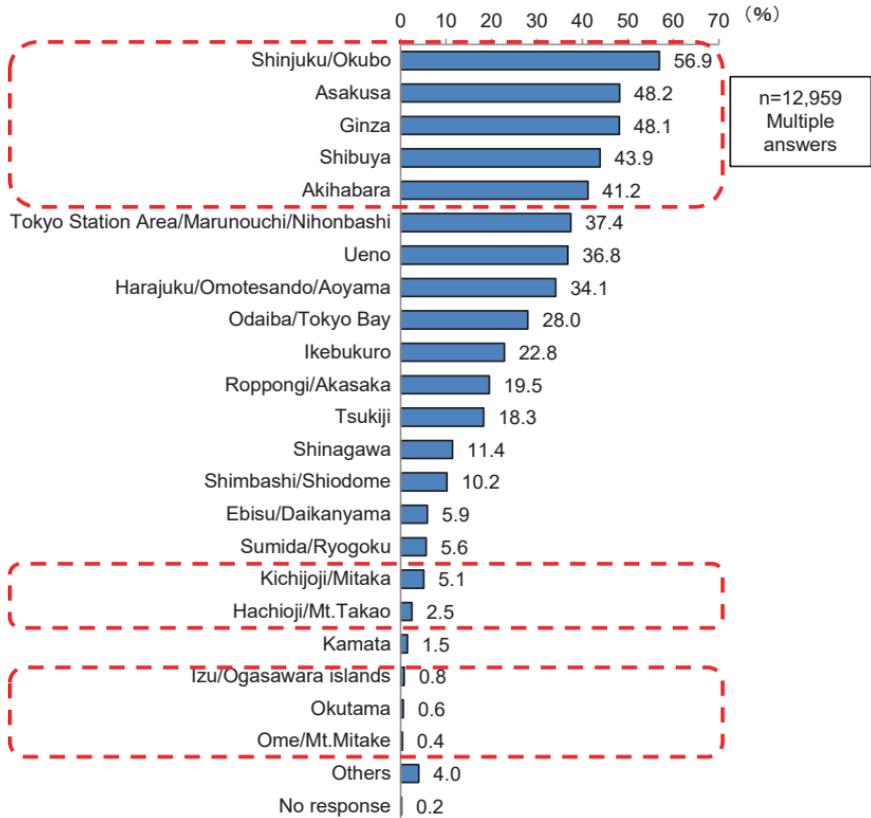
- Tourists from **Europe, North America and Australia** spend more than those from Asia.



Source: Japan Tourism Agency

Top destinations in Tokyo for inbound tourists (FY2016)

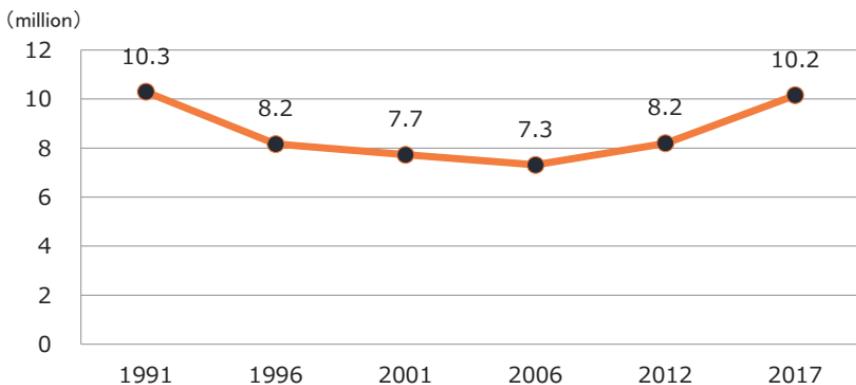
- The center of the city is most popular, led by Shinjuku/Okubo, Asakusa, Ginza, Shibuya and Akihabara.
- Efforts to encourage tourism to the Tama area and the outlying islands have yet to make progress.



Source: Tokyo Metropolitan Government

Number of tourist arrivals in the Nishitama area

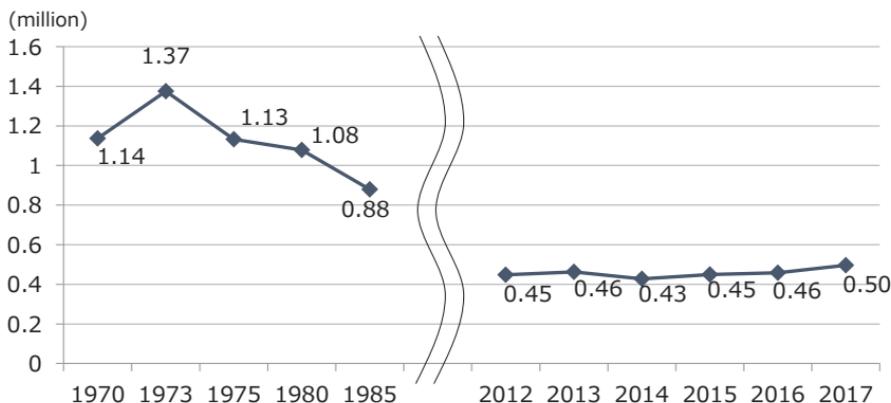
- The number of tourists visiting the Nishitama area in western Tokyo has **increased in recent years.**



Source: Nishitama administrative council

Number of tourists to Izu and Ogasawara islands

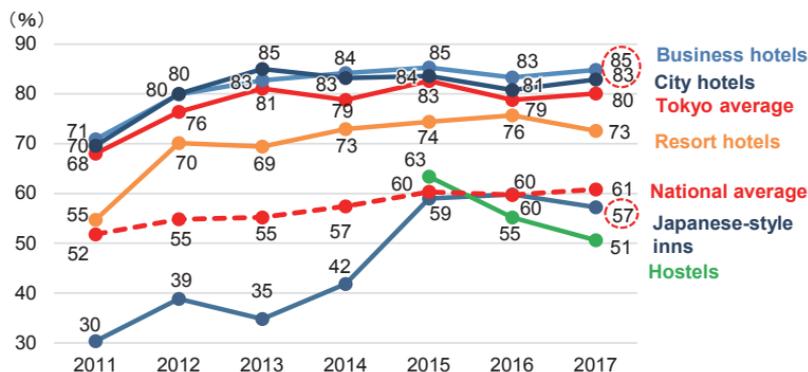
- Tourist arrivals in the outlying islands have remained at **around 0.4 million in recent years.**



Source: Tokyo Metropolitan Government

Occupancy rates by accommodation type in Tokyo

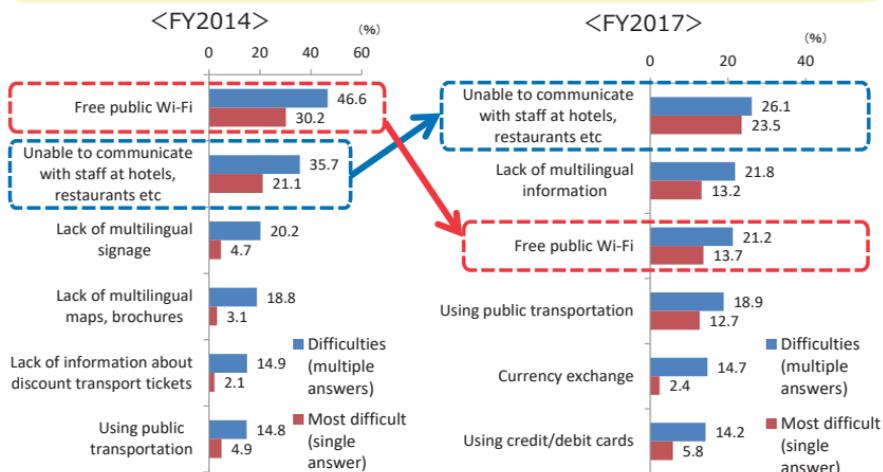
- Hotel occupancy rates have increased to 80%, but Japanese-style inn occupancy rates are still only 60%.



Note: Figures for 2017 are estimates. Source: Japan Tourism Agency

Difficulties experienced travelling in Japan

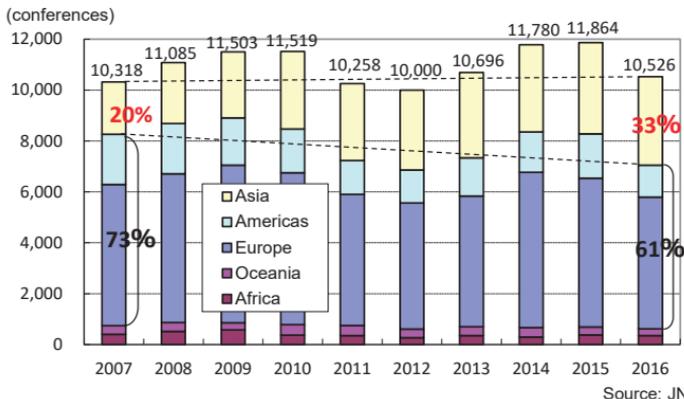
- The most frequent reported problem for inbound tourists in FY2017 was “Unable to communicate with staff at hotels, restaurants etc” while that in FY2014 was “Free public Wi-Fi”.



Note: Top 6 difficulties are listed, excluding “I didn’t have any problems.”
Source: Ministry of Internal Affairs and Communications, Japan Tourism Agency

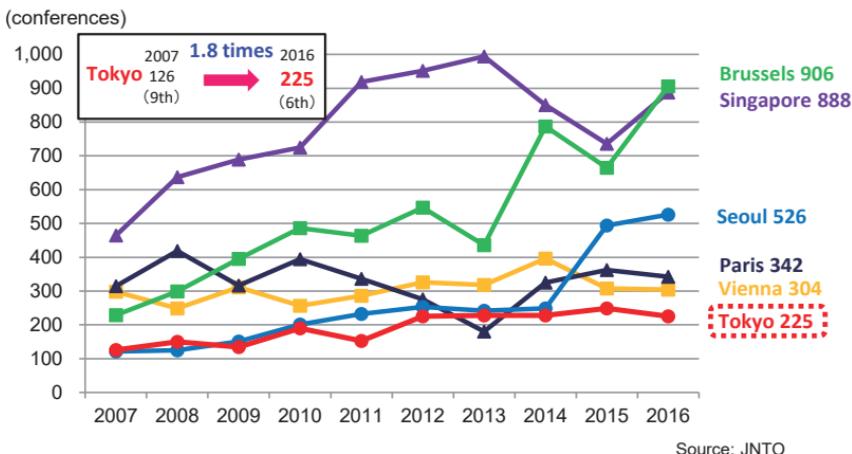
Global market for international conferences

- Owing to its economic growth, Asia's share of the global market for international conferences has increased **1.6 times in the last decade**.



Number of international conferences by city

- The number of international conferences in Tokyo has increased **1.8 times in the last decade**, though Tokyo still lags behind competitors such as Singapore and Seoul.



Condé Nast Traveler The Best Cities in the World 2017

- Condé Nast Traveler, an American luxury travel magazine, has ranked Tokyo 1st for two consecutive years in its rankings of the most attractive destination cities

Top 10 Best Cities in the World, chosen by readers

1st	Tokyo (Japan)	※1st
2nd	Vienna (Austria)	※10th
3rd	Kyoto (Japan)	※2nd
4th	Barcelona (Spain)	※9th
5th	Paris (France)	※11th
6th	Sydney (Australia)	※12th
7th	Madrid (Spain)	※27th
8th	Vancouver (Canada)	※6th
9th	Rome (Italy)	※15th
10th	Munich (Germany)	※38th

Note: Excludes U.S. cities
*2016 rank after country name
Source: TMG press release

↓ To learn more, follow the link below

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<http://www.sangyo-rodo.metro.tokyo.jp/plan/tourism/plan/prime2018/>



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