

## Inbound Market in Japan: Key Research Findings 2016

### ◆ Research Outline

Yano Research Institute has conducted the domestic inbound market with the following conditions:

1. Research period: January to September, 2016
2. Research targets: Department stores, famous name brand companies, retailers, etc.
3. Research methodologies: Face-to-face interviews by the specialized researchers, surveys via telephone, and literature search.

#### What is the Domestic Inbound Market in This Research?

The domestic inbound market indicates mainly the amount of money spent on commodity purchase (not including accommodation or transportation fees) by foreign visitors in Japan who can either be the tourists or business people. The market of each of such commodities has been surveyed to calculate the sum spent by foreign tourists, the results of which are added up as the domestic inbound market size. Note that the data in this report has been researched, calculated and estimated by Yano Research Institute; therefore they are different from those announced by Ministry of Land, Infrastructure and Transport.

### ◆ Key Findings

#### ■ Number of Foreign Visitors in 2020 Attains 36,790 Thousand, 1.9 Times Larger Than 2015

The number of foreign visitors in Japan is likely to reach 36,790 thousand by 2020, according to this research that analyzed the data on number of foreign visitors in the light of the population by country, tourism trends, and economic background. Especially, the visitors from China and other Asian countries are stably on the increase. However, rapid expansion of the market is likely to be gradually subdued to keep moderate growth, considering the world affairs, economic conditions, and currency movements.

#### ■ Domestic Inbound Market Attains 1,876.4 Billion Yen by 2020, 1.3 Times Larger Than That of 2015, With Growing Number of Visitors Keeping Steady Market Growth

Size of the domestic inbound market calculated based on the commodities purchased by foreign visitors (accommodation and transportation fees NOT included) is likely to scale down temporarily in 2016 but to revive and expand in 2017 and beyond, because incremental foreign visitors boost the entire market, although the level of unit price of commodities purchased per foreign visitor may be the same as that of 2016. The market size is projected to reach 1,876.4 billion yen by 2020, 1.3 times larger than that of 2015.

#### ■ Tokyo, Largest Inbound Market Among All Prefectures Achieved 607.7 Billion Yen in 2015, 3.4 Times Larger Than Second Largest Osaka

The domestic inbound market by prefecture prominently shows the difference among the prefectures. In fact, only a few prefectures have been benefited from the recently prosperous inbound market, and most of other prefectures have not yet gone that far. The inbound market in Tokyo attained 607.7 billion yen in 2015, dominating 40.9% of the entire domestic inbound market share by prefecture, followed by Osaka, Chiba, Kyoto, Fukuoka, Okinawa, and etc., in descending order, benefited in proportion to how large the number of foreign visitors they accepted. It indicates that such prefectures are considered to have some attractive places for the foreign visitors to willingly spend money on.

◆ **Report Format**

Published report: “Inbound Tourism Market (Actual Status) 2016”

Issued on: September 30, 2016

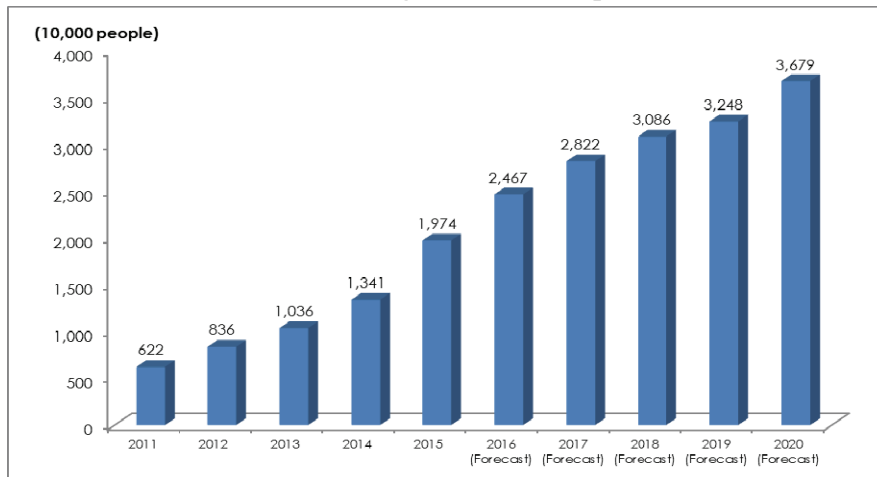
Language: Japanese

Format: 187 pages in A4 format

Price: 150,000 yen (The consumption tax shall additionally be charged for the sales in Japan.)

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■ **Figure 1: Forecast of Number of Foreign Visitors in Japan**

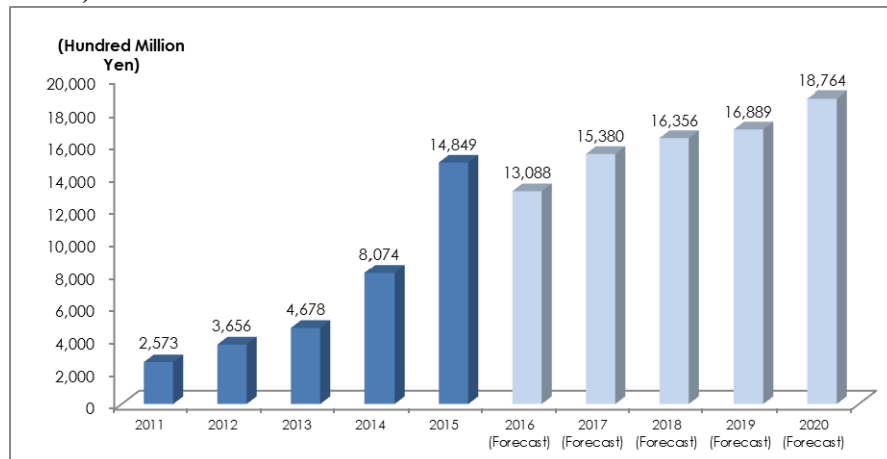


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Notes:

1. The numeric values from 2011 to 2015 in Figure 1 quote data from JNTO, and those from 2016 to 2020 are estimated by Yano Research Institute.

■ **Figure 2: Transition of Size of Domestic Inbound Market (Based Only on Purchased Commodities)**

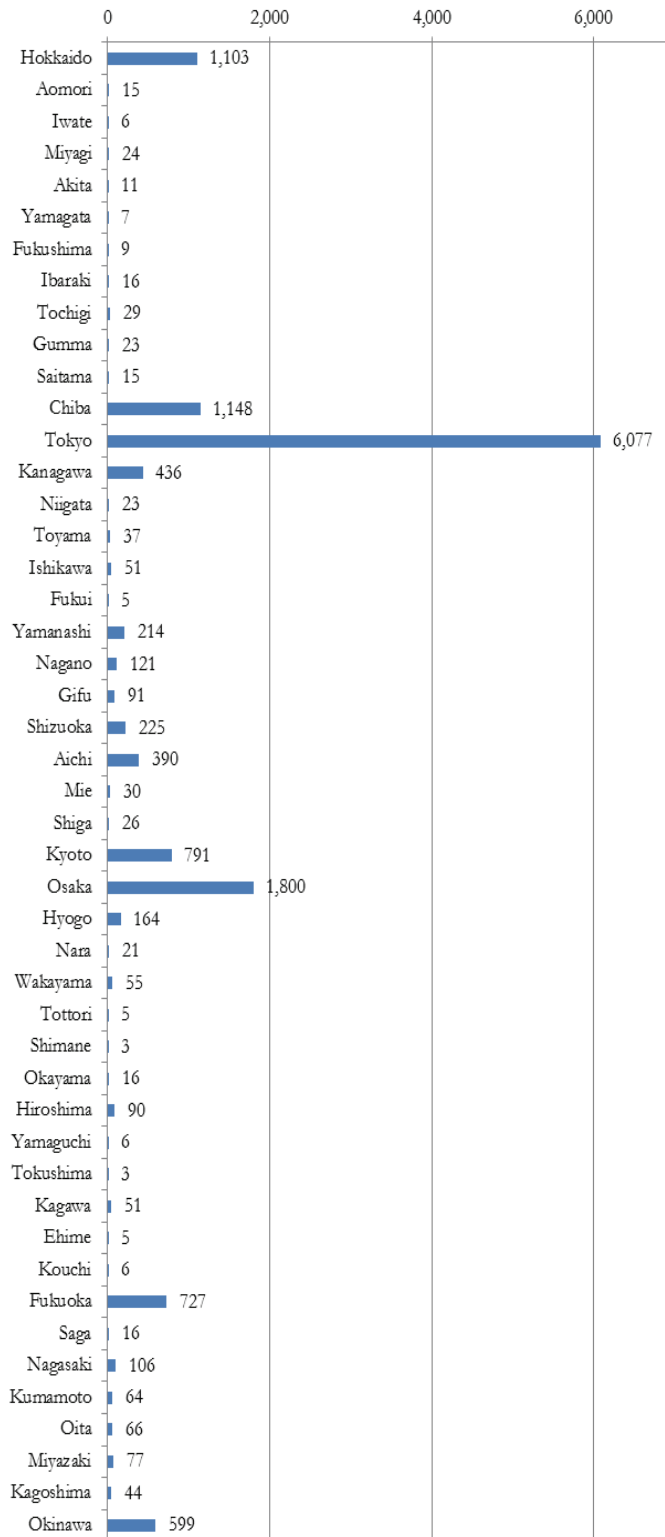


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Note:

2. The market size is calculate based on the amount of money spent on commodity purchase (not including accommodation or transportation fees) by foreign visitors in Japan who can either be tourists or business people.)
3. The market of each of commodities has been surveyed to calculate the sum spent by foreign tourists, the results of which are added up as the domestic inbound market size. Note that the data in this report has been researched, calculated and estimated by Yano Research Institute; therefore they are different from those announced by Ministry of Land, Infrastructure and Transport.

■ **Figure 3: Domestic Inbound Market Size by Prefecture (Sum of Money Consumed by Foreign Visitors in Japan, Including only Commodity Purchase)**



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Note:

- The market size is calculate based on the amount of money spent on commodity purchase (not including accommodation or transportation fees) by foreign visitors in Japan who can either be tourists or business people.