Visit World Campaign
2008 Promotional Activity Report
and
Plan for 2009

Japan Association of Travel Agents (JATA)
VWC 20 Million Travelers Promotion Office
April 2009
Under the auspices of the Tourism Nation Promotion Act, the Japanese government is encouraging the expansion of two-way tourism between Japan and the world. The policy calls for increasing inbound visitors to Japan to 10 million people and increasing Japanese outbound travelers to 20 million people by 2010.

In 2007, approximately 17.3 million Japanese traveled overseas. The total was influenced by such factors as a shift away from overseas travel by young people, stagnant growth in departures from Japan’s regional centers and lackluster consumer spending.

In today’s global society, two-way tourism plays an important role in elevating Japan’s profile in the world and fostering understanding of Japan. It is with these goals in mind that the Visit Japan Campaign and now the Visit World Campaign (VWC) have been launched.

The VWC brings together the Japan Tourism Agency and other related government ministries, tourism offices, airlines, airport authorities and other concerned parties as members of the VWC 20 Million Travelers Promotion Special Committee (VWC Committee) and establishes the VWC Promotion Office at JATA. The two bodies are tasked with stimulating outbound travel including travel from Japan’s regions.

The VWC will unite the Japanese travel and tourism industry behind the common goal of achieving the target of 20 million outbound travelers by 2010.
1. Basic Scheme of the Visit World Campaign

2. 2008 Japanese Overseas Travelers

3. 2008 Visit World Campaign Promotional Activities

4. 2009 Visit World Campaign Promotional Activity Plan
Visit World Campaign Objectives

Basic Concept:
• Expand Two-way Tourism between Japan and the world

Objectives:
• Increase the number of Japanese outbound travelers to 20 million by 2010
• Review the current business model and build a stronger business relationship between Japanese tour operators and travel agencies and overseas travel business partners
Inauguration of
The Visit World Campaign Promotion Office
Launching the Visit World Campaign

Conducted the first VWC Promotion Executive Committee Meeting on April 04, 2008 at the Imperial Hotel, Tokyo, approving the 3-year Visit World Campaign project. Also, after the meeting, conducted a press conference and Kick-off party inviting over 250 people from travel trade industry.
Visit World Campaign Organization Chart

VWC 20 Million Travelers Promotion Executive Committee

VWC 20 Million Travelers Promotion Office

Three Main Strategic Pillars
1. Destination Promotion Strategy
2. Japan Regional Redevelopment Strategy
3. Direct Marketing & Media Strategy

JATA Outbound Travel Committee

Various Structural Issues
Consideration of Regulatory reform
Air transportation issues (with airlines)
Three-Year Plan 2008-2010 & Target Markets

Overseas Travel Promotion and Demand Stimulation

The First Two Years (2008 & 2009)
- Focus and Selection
- Restructuring of Business Model

The Third Year (2010)
- The Year of Great Strides

Target Markets
- ✔ Youth Market – 20’s and 30’s
- ✔ Senior Market
- ✔ Family Travel Market
Structure of Visit World Campaign Promotion Office
(1) **Promotion Office structure as of April 2009**

1) Total Number of Staff Members: 10
   - 9 VWC staff members and 1 manager from the JATA Outbound Travel Department
2) Director: Hiroshi Sawabe
3) Deputy Director: Toshifumi Tabata (from Nippon Travel Agency)
4) Staff (alphabetically): Hideki Kumon (from H.I.S.), Yuzo Murakami (from JALPAK), Yoshikazu Ogino (from Hankyu Express), Katsuko Shimizu (from Kinki Nippon Tourist), Kanjyu Tsukizawa (from ANA Sales), Takeshi Yanagawa (from JTB)
5) General affairs: Momoko Seto
6) From JATA Outbound Travel Department: Fumiyoshi Akisawa

(2) **Regular Update Meetings**

1) VWC Executive Meetings
   - Every other month with Chairman and Vice Chairman of VWC Executive Committee and JATA Executive Directors
2) JATA・VWC Staff Meetings
   - Twice a month with JATA Secretary General, Vice Secretary General and Director of JATA Outbound Travel Department
1. Basic Scheme of the Visit World Campaign

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4. 2009 Visit World Campaign Promotional Activity Plan
Number of Japanese Overseas Travelers, 2000–2010

(Thousands)

<table>
<thead>
<tr>
<th>Year</th>
<th>2000</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual</td>
<td>17,819</td>
<td>16,216</td>
<td>16,523</td>
<td>13,296</td>
<td>16,831</td>
<td>17,403</td>
<td>17,534</td>
<td>17,298</td>
<td>15,987</td>
<td>19,000</td>
<td>20,000</td>
</tr>
<tr>
<td>Growth</td>
<td>8.9</td>
<td>-9.0</td>
<td>1.9</td>
<td>-19.5</td>
<td>26.6</td>
<td>3.4</td>
<td>0.8</td>
<td>-1.3</td>
<td>-7.6</td>
<td>5.6</td>
<td>5.3</td>
</tr>
</tbody>
</table>

Data Source: JNTO

2008 Target 18,000,000
Japanese Overseas Travelers by Month 2007-2008

<table>
<thead>
<tr>
<th>Month</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>2007</td>
<td>1,407,790</td>
<td>1,377,670</td>
<td>1,575,478</td>
<td>1,289,713</td>
<td>1,305,574</td>
<td>1,381,922</td>
<td>1,413,231</td>
<td>1,687,050</td>
<td>1,550,601</td>
<td>1,484,102</td>
<td>1,370,688</td>
<td>17,294,935</td>
<td></td>
</tr>
<tr>
<td>2008</td>
<td>1,353,928</td>
<td>1,372,626</td>
<td>1,455,505</td>
<td>1,183,191</td>
<td>1,267,951</td>
<td>1,272,663</td>
<td>1,331,867</td>
<td>1,486,016</td>
<td>1,370,631</td>
<td>1,353,482</td>
<td>1,264,104</td>
<td>15,987,250</td>
<td></td>
</tr>
<tr>
<td>Growth</td>
<td>▲3.8</td>
<td>▲0.4</td>
<td>▲7.6</td>
<td>▲8.3</td>
<td>▲2.9</td>
<td>▲7.9</td>
<td>▲5.8</td>
<td>▲11.9</td>
<td>▲11.6</td>
<td>▲9.8</td>
<td>▲12.9</td>
<td>▲6.0</td>
<td>▲7.6</td>
</tr>
</tbody>
</table>

Data Source: JNTO
1. Basic Scheme of the Visit World Campaign

2. 2008 Japanese Overseas Travelers

3. 2008 Visit World Campaign Promotional Activities

4. 2009 Visit World Campaign Promotional Activity Plan
Overseas Travel Promotion and Demand Stimulation: Three Main Strategic Pillars

- Destination Promotion Strategy
- Japan Regional Redevelopment Strategy
- Direct Marketing & Media Strategy

Market Research & Development
Destination Promotion Strategy
Destination Promotion Strategy

More Travel to Key Destinations
- Stimulate travel to languishing traditional major destinations
- Expand more travel to growing destinations
- Develop new destinations

Time Frame and Designation of Key Destinations
- Designate several key destinations every 6 months
  (Approx. 25 destinations in three years)
- First half of 2008: Mainland US, Hawaii, Guam, Korea, Taiwan, Hong Kong, Thailand, Australia and France
- Second half of 2008: China, Vietnam and Macau
## 2008 VWC Key Destinations

<table>
<thead>
<tr>
<th>April 2008 Designated VWC Key Destinations</th>
<th>October 2008 Additional Designated VWC Key Destinations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mainland US</td>
<td>Vietnam</td>
</tr>
<tr>
<td>Hawaii</td>
<td>China</td>
</tr>
<tr>
<td>Guam</td>
<td>Macau</td>
</tr>
<tr>
<td>Korea</td>
<td></td>
</tr>
<tr>
<td>Taiwan</td>
<td></td>
</tr>
<tr>
<td>Hong Kong</td>
<td></td>
</tr>
<tr>
<td>Thailand</td>
<td></td>
</tr>
<tr>
<td>Australia</td>
<td></td>
</tr>
<tr>
<td>France</td>
<td></td>
</tr>
</tbody>
</table>
“Triangular Relationship"

Tourist bureau

Travel agent

B2B

- Travel informamt
- Material offer

B2C

- Airlines
- Hotels
- Car Rental, etc.

Consumer

- Sightseeing information
- Announcement

Hotel accommodations?
- Good for Japanese?
- Quality of a guide?
### Japanese Visitors to VWC Key Destinations 2007-2008

<table>
<thead>
<tr>
<th>Key Destinations</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mainland U.S.</td>
<td>1,303</td>
</tr>
<tr>
<td>Hawaii</td>
<td>1,296</td>
</tr>
<tr>
<td>Guam</td>
<td>932</td>
</tr>
<tr>
<td>Korea</td>
<td>2,236</td>
</tr>
<tr>
<td>Taiwan</td>
<td>1,171</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>1,324</td>
</tr>
<tr>
<td>Macau</td>
<td>291</td>
</tr>
<tr>
<td>Thailand</td>
<td>1,278</td>
</tr>
<tr>
<td>Vietnam</td>
<td>411</td>
</tr>
<tr>
<td>France</td>
<td>657</td>
</tr>
<tr>
<td>Australia</td>
<td>573</td>
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</table>

<table>
<thead>
<tr>
<th></th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mainland U.S.</td>
<td>1,249</td>
</tr>
<tr>
<td>Hawaii</td>
<td>1,161</td>
</tr>
<tr>
<td>Guam</td>
<td>847</td>
</tr>
<tr>
<td>Korea</td>
<td>2,378</td>
</tr>
<tr>
<td>Taiwan</td>
<td>1,091</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>1,329</td>
</tr>
<tr>
<td>Macau</td>
<td>370</td>
</tr>
<tr>
<td>Thailand</td>
<td>1,049</td>
</tr>
<tr>
<td>Vietnam</td>
<td>393</td>
</tr>
<tr>
<td>France</td>
<td>578</td>
</tr>
<tr>
<td>Australia</td>
<td>457</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Growth %</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mainland U.S.</td>
<td>▲4.2%</td>
</tr>
<tr>
<td>Hawaii</td>
<td>▲10.5%</td>
</tr>
<tr>
<td>Guam</td>
<td>▲9.2%</td>
</tr>
<tr>
<td>Korea</td>
<td>+6.4%</td>
</tr>
<tr>
<td>Taiwan</td>
<td>▲6.8%</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>+0.03%</td>
</tr>
<tr>
<td>Macau</td>
<td>+27.5%</td>
</tr>
<tr>
<td>Thailand</td>
<td>▲17.9%</td>
</tr>
<tr>
<td>Vietnam</td>
<td>▲4.5%</td>
</tr>
<tr>
<td>France</td>
<td>▲12.0%</td>
</tr>
<tr>
<td>Australia</td>
<td>▲20.2%</td>
</tr>
<tr>
<td><strong>Sub Total</strong></td>
<td>▲5.0%</td>
</tr>
<tr>
<td>China</td>
<td>▲13.4%</td>
</tr>
<tr>
<td><strong>Grand Total (Unit: 1,000)</strong></td>
<td><strong>▲7.1%</strong></td>
</tr>
<tr>
<td>Japanese Overseas Travelers</td>
<td><strong>17,295</strong></td>
</tr>
</tbody>
</table>
Japan Regional Redevelopment Strategy
Revitalization of Kansai, Chubu and Other Regions
– Stimulate languishing markets
– Build close cooperation with Kansai, Chubu and other regional airports

Action
– Support regional Overseas Travel Fairs with JATA regional offices
– Launch a “Passport Campaign” in the second half of FY2008
– Launch destination seminars and familiarization tours
– Support the launch of charter flights to stimulate regional demand through two-way tourism
– Support regional student overseas promotional events
Japan regional Redevelopment Activities

(Kansai)
World Travel Fair
2009 Mar.

(Hokkaido)
World Travel Fair
2008 Aug.

(Sendai)
World Travel Fair
2009 Mar.

(Kumamoto)
World Travel Fair
2009 Mar.

(Fukuoka)
World Travel Fair
2009 Mar.

(Kagoshima)
World Travel Fair
2009 Mar.

1. Chubu Int. Airport
   2008 Jul.
2. Travel Agent campagin
   2008 Aug.
3. Airport estival
   2008 Nov.
Direct Marketing and Media Strategy
Develop strategic campaign to stimulate overseas travel demand
– Launch overseas travel promotional events and advertising closely cooperating with tourism offices, airlines, hotels, receptive operators and destination partners
– Increase overseas travel coverage in nationwide mass media—newspapers and TV

Action
– Utilize the VWC logo
– Joint publicity and coop advertising
  • “Train Jack”
  • VWC Destination promotion DVD
  • Publication of “Travel Trend 2009” magazine
– “Motto Kaigai-e!” (More overseas travel) events at JATA World Travel Fair
– Nationwide “Passport Campaign” and regional “Get A Passport Campaign”
– Friendship overseas travel promotion program--“Friendship Travel Reporter”
– VWC promotion through travel websites
– Travel features in media
Train Jack – Coop Advertisement

Metropolitan Area,
September 01~15, 2008

Kansai Area,
March 05~29, 2009
“Friendship Travel Reporter” Program

“Friendship Travel Reporter to Find New Tour Products”
Advertised for reporters who want to take part
Sponsorship Country/Area:  State of California, Korea, Guam, Taiwan and France
Number of Applicants:  1,600

Appointment ceremony of “Friendship Travel Reporter” on September 21, 2008 at JATA World Travel Fair

Travel Reports on leading travel websites

Reports on Travel Portal Website
Nation-wide “VWC Passport Campaign”

Overseas travel stimulus nation-wide program - “VWC Passport Campaign”
Win overseas tours, international airline tickets, overseas hotel coupons and more!

In commemoration of the establishment of Japan Tourism Agency
Launching “VWC Passport Campaign”

<table>
<thead>
<tr>
<th>Sponsorships:</th>
<th>JATA, Japan Travel Agency, International Airlines, Overseas Hotels and Government Tourism Offices</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaign Period:</td>
<td>October ~ December, 2008</td>
</tr>
<tr>
<td>Prizes:</td>
<td>(1) Overseas Package Tours</td>
</tr>
<tr>
<td></td>
<td>(2) International Airlines Tickets</td>
</tr>
<tr>
<td></td>
<td>(3) Overseas hotel accommodations coupons</td>
</tr>
<tr>
<td></td>
<td>(4) “New Travel Trend 2009” travel magazine</td>
</tr>
<tr>
<td>Qualification for Application:</td>
<td>Those who hold Passport</td>
</tr>
</tbody>
</table>

Total Applicants: 27,147
PR Activities
PR Activities

2008 Travel Information/News

Travel Information Releases: 25
Event Reports: 33
Press Releases: 15
Market Research and Development
Market Research and Development

Market research on travel trends and awareness

– Market research targeting people in their 20’s and 30’s: rate of overseas travel during the last ten years continuously declining
– Market research targeting key major destinations and areas continuously declining

Action

– Young people in their 20’s and 30’s (action in the FY2008)
  • Conduct Internet research of target demographic groups in cooperation with Wakayama University
  • Release and share research results
  • Hold a Youth Town Meeting to increase awareness about trends and needs

– Europe (action in the FY2008-2009)
  • Build a research team composed of tourism offices, airlines, land operators and travel agencies and draft a road map for a strategic research plan
## Market Research and Development on Youth People in their 20’s and 30’s

The 1st Project of Joint Market Research with Dept. of Travel Industry, University of Wakayama

“Overseas Travel Trend of Youth People”

<table>
<thead>
<tr>
<th>Purpose:</th>
<th>Trend and behavior of youth people on their overseas travel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Target Audience:</td>
<td>Youth people</td>
</tr>
<tr>
<td></td>
<td>(15 years old to 39 years old, both male and female)</td>
</tr>
<tr>
<td>Area:</td>
<td>Nation-wide, Japan</td>
</tr>
<tr>
<td>Research Method:</td>
<td>Through Internet</td>
</tr>
<tr>
<td>Research Period:</td>
<td>July 23〜25, 2008</td>
</tr>
<tr>
<td>Responses:</td>
<td>4,740 responses</td>
</tr>
<tr>
<td>Research Agent:</td>
<td>MICROMIL Research Company</td>
</tr>
</tbody>
</table>
Town Meeting of Youth People

Town Meeting of Youth People highlighting
“Trend and Behavior of Overseas Travel by Youth People”
Encourage youth people to travel abroad,
Find out the reason why they are reluctant to travel abroad now

Town Meeting: September 19, 2008
Moderator: Prof. Hiraoka,
University of Wakayama
Place: Tokyo Big Site
Participants: College students and travel agents in their 20’s and 30’s
300 people
Joint Seminar with Japan Tourism Agency
“Trend and Behavior of Overseas Travel by Youth People”

Based on the results of market research conducted by Japan Tourism Agency and JATA VWC Promotion Office, Conducted a joint seminar highlighting “Overseas Travel by Youth People”

Date: October 21, 2008  
Sponsor: Japan Tourism Agency  
JATA VWC Promotion Office  
Subject: Trend and behavior of overseas travel by youth people  
Participants: Session One for Travel Trade - 45 people  
Session Two for Suppliers and Trade Media - 120 people
The 2\textsuperscript{nd} Project of Market Research and Development Highlighting “Revitalization of Japanese Europe Travel Market”

**Action 1: VWC Europe PR Campaign**

**VWC Europe PR Campaign**

**Asahi Shimbun Newspaper PR Campaign**
- **Period:** Early March to Early April 2009
- **10 times PR article placement**
- **Contents:** Topics and information on travel products/places and lifestyle in Europe

**J-Nude (Fashion magazine for female)**
- **Date:** April 02, 2009
- **Contents:** Trend and new information on Café in Europe
1. Basic Scheme of the Visit World Campaign

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4. 2009 Visit World Campaign Promotional Activity Plan
1) Designated VWC key destinations in 2008
   - Designated 12 countries/areas as key destinations for 2008
   - Key destinations: Mainland US, Hawaii, Guam, Korea, Taiwan, Hong Kong, Thailand, Australia, France, Macau, Vietnam and China

2) Designate additional VWC key destinations in 2009
   - Designated three countries/areas in the first half of 2009: Malaysia, Egypt and Danube area countries
   - Plan to Designate 1-2 additional countries/areas as the VWC key destination in the second half of 2009

3) Actions
   - Encourage travel agents to positively participate in “Destination Study Tours”
   - Organize Working Groups, Study Tours, Media Tours and Destination Seminars for travel agents, etc. while closely communicating with government tourism offices and international airlines
Key Destination

※First Half of 2009

- Korea
- Hong Kong
- Taiwan
- U.S.A.
- Hawaii
- Guam
- Australia
- Thailand
- France
- China
- Vietnam
- Macau
- Egypt
- Danube River
- Malaysia
- U.S.A.
- Hawaii
- Guam
- Australia
1) Regional Overseas Travel Fairs & Events
   - Provide support for regional overseas travel fairs and events closely communicating with the regional JATA chapters, local authorities and regional airports to stimulate regional travel markets

2) Regional international airports
   - Strengthen business relationships with regional international airport promotion offices
   - Assist and support overseas travel events at the opening of the Mt. Fuji Shizuoka Airport, which will be opened in June 2009

3) Conduct seminars of de-regulated charter flights operation rules and promote the use of charter flights out of regional international airports
1) Extensive use of VWC logo “Motto Kaigai he” (Travel Abroad More!)
   - Distribute VWC pin badges, VWC posters, VWC DVDs, etc.

2) Special Campaign
   - “The 2nd Travel Reporter to Find New Tour Products” campaign with VWC key destinations
   - “Student Overseas Travel Events” at colleges and universities – youth travel promotion

3) Joint publicity and coop advertising – the first half of 2009
   - Train Jack (Kanto Metropolitan Area – End of June)

4) Participation in JATA World Tourism Congress and World Travel Fair 2009
   - Preparation for a panel discussion and participation as exhibitor

5) “Let’s go Kaigai” (“Let’s go abroad”) event
   - Provide support for this event to stimulate the Tokyo overseas travel market

6) Publications in media
   - Contract with a professional PR agency to expand exposure of VWC activities
   - Increase the opportunities to produce travel destination articles in travel magazines, newspapers and on TV
(4) Market Research and Development

EUROPE

U.S.A.
1) Market Development and Research on Europe Tours
   (From October 2008 to July 2009)
   - In co-operation with ETC member country tourism offices, conduct research
     of B2B (travel trade) & B2C (general consumer), seminars and agent study
     tours
   - Launch “VWC Europe PR Campaign” using the Asahi Shinbun
     (March to April 2009)

2) Market Development and Research on Tours to the Mainland US
   (October 2009 to July 2010)

3) Market Development and Research on “Cruise Travel” and “Student
   Educational Tours”
   (October 2009 to December 2010)
Visit World Campaign