



USA

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Brand USA

Market Information

JAPAN

2020

About This Guide

This market guide includes a snapshot of the economies in Japan, along with information about travel from this region (booking channels, consumer trends, U.S. international inbound visitation data, and key travel motivators and indicators).

Brand USA.....	4
Who We Are.....	4
A Message from Christopher L. Thompson.....	6
Brand USA Executive & Senior Leadership.....	8
Market Facts	9
Geography	9
Demographics	10
Economy	11
Vacation Allocation.....	11
Travel Trends	12
International Travel Trends.....	12
Inbound Travel Trends	13
Traveler Characteristics.....	14
Air Travel Information	17
Market Snapshot.....	22
Brand USA Resources	33
Online Channels.....	33
Brand USA Traveler Research.....	36
Highlights of Success.....	42
Brand USA Markets.....	43
Brand USA Partnerships.....	44
Visit USA Committee, Japan.....	44
About the U.S. Department of Commerce.....	45

Brand USA



Who We Are

Our Mission

As the destination marketing organization for the United States, Brand USA's mission is to increase incremental international visitation, spend, and market share to fuel the nation's economy and enhance the image of the USA worldwide.

Established by the Travel Promotion Act of 2009 as the nation's first public-private partnership to spearhead a globally coordinated marketing effort to promote the United States as a premier travel destination and to communicate U.S. visa and entry policies, Brand USA began operations in May 2011.

Building on Success

As one of the best levers for driving economic growth, international travel to the United States currently supports 1.8 million American jobs (directly and indirectly) and benefits virtually every sector of the U.S. economy. Since its founding, Brand USA has worked with more than 900 contributing organizations to invite the world to explore the exceptional, diverse, and virtually limitless travel experiences and destinations available in the United States of America.



Our Partnerships

Brand USA's operations are supported by a combination of non-federal contributions from destinations, travel brands, and private-sector organizations plus matching funds collected by the U.S. government from international visitors who visit the United States under the Visa Waiver Program.

According to studies by Oxford Economics, over the past seven years, Brand USA's marketing initiatives have helped welcome 7.5 million incremental visitors to the USA, benefiting the U.S. economy with nearly \$55 billion in total economic impact, and supporting more than 50,000 incremental jobs each year.

Learn More

For industry or partner information about Brand USA, please visit TheBrandUSA.com. For information about exceptional and unexpected travel experiences in the United States, please visit Brand USA's consumer website at VisitTheUSA.com.

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A Message from Christopher L. Thompson



As the destination storytellers for the United States of America, Brand USA helps drive our nation's economy, create jobs, and bring the people of the world closer together. This guide is designed to assist you in generating business from the Japan outbound-travel sectors. And, while it includes data from our fiscal year 2019, it's important to acknowledge the unprecedented impact of COVID-19 in 2020. The global

pandemic has resulted in tremendous loss for many families and has had a devastating impact on the travel industry. All of this makes Brand USA's work even more critical. We are uniquely positioned to help guide the industry out of this crisis.

Japan continues to rank as the second largest overseas source market for inbound visitation with 3.8 million people traveling to the United States in 2019 and currently ranks as sixth overall in spend at \$16 billion. As noted by the U.S. National Travel and Tourism Office, the top five activities visitors from Japan look for are sightseeing, shopping, fine dining, guided tours, and water sports.

Our forward-thinking marketing approaches allow us to capture the attention of global audiences in new, more compelling ways which ensure the United States stays top-of-mind as an aspirational travel destination. Brand USA uses many voices to showcase the diverse people and places across the United States in a way that inspires and encourages wanderlust. In FY2019, Brand USA launched the *United Stories* campaign giving voices to real travel experiences from a variety of perspectives including locals, international visitors, category experts and the creative class. We continued to stream content through the GoUSA TV streaming and YouTube channels, which offer a variety of short, medium, and long-form content about a diversity of travel experiences.



As you consider resources, please know Brand USA has a dedicated travel-trade website which provides a more effective and efficient platform for industry professionals to navigate information about U.S. travel. In addition, please don't hesitate to reach out to our team about U.S. destinations, the opportunities we offer to enhance your marketing efforts, and the most effective ways to inspire travelers to book trips to the USA.

We look forward to working with you in the months ahead to generate business to the United States from Japan.

Together, we are marketing the USA!

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Market Facts

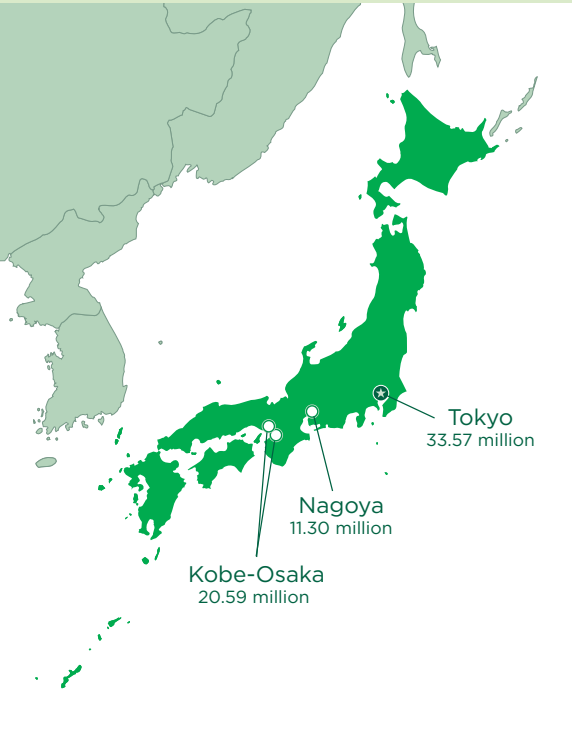


Geography

Area

377,915 km²
(slightly smaller
than California)

Largest Metropolitan Areas



Photos: Kobe (left); Fujiyoshida (right)
Source: CIA World Factbook 2019

Demographics

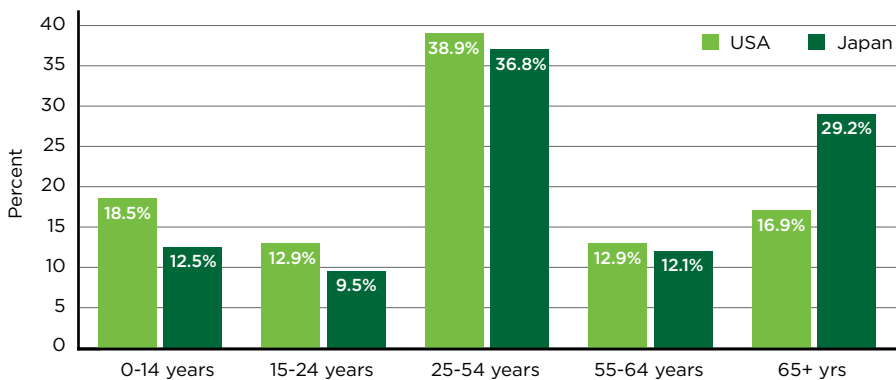
Population

	Japan	USA
Population Size	125,507,472	323,730,000
World Rank	62	3
Median Age	48.6 years	38.5 years
Population Growth Rate (2019 est.)	-0.27%	0.72%

Largest Metropolitan Areas

- **Tokyo:** 33.57 million (capital, finance, commerce, tourism)
- **Osaka-Kobe:** Osaka: 20.59 million (electronics)
- **Nagoya:** 11.3 million (automobiles)

Population by Age



Source: CIA World Factbook 2019



Economy

- **GDP:** \$4.970 trillion
- GDP Real Growth Rate: 1.8% (2020 est.)
- **GDP—Per Capita:** \$48.9
- **Unemployment Rate:** 2.2%
- **Inflation Rate:** 0.3%

Vacation Allocation

Salaried Japanese employees typically have a maximum of 20 paid vacation days (depending on seniority), plus 18 public holidays. Japanese workers typically receive two bonuses per year, often equivalent to two months' salary, but these are dependent on the performance of the company.

Primary Travel Periods 2020

- **Golden Week:** April 29–May 6
- **Obon:** Mid-August
- **Silver Week:** September 19–22
- **New Year Holiday:** December 30–January 3

Public School Holidays 2020

- **Spring:** 2–3 weeks (late March to early April)
- **Summer:** 5–6 weeks (late July through end of August)
- **Winter:** 2–3 weeks (late December to early January)

Travel Trends

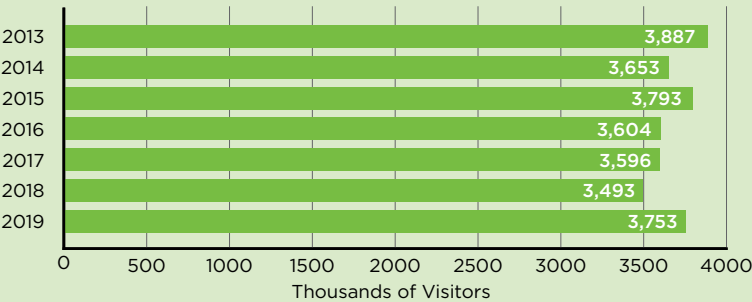


International Travel Trends

Spending Trends: Exports (millions of U.S. dollars)

	2013	2014	2015	2016	2017	2018	2019
Total Travel & Tourism Exports	\$16,984	\$17,331	\$17,790	\$16,859	\$16,743	\$15,824	\$16,030
Travel Receipts	\$11,545	\$11,220	\$11,786	\$11,112	\$10,808	\$10,283	\$10,585
Passenger Fare Receipts	\$5,439	\$6,111	\$6,004	\$5,747	\$5,935	\$5,541	\$5,445
Change (%) in Total Exports	-0	2	3	-5	-1	-5	1

Visitation Trends: Arrivals



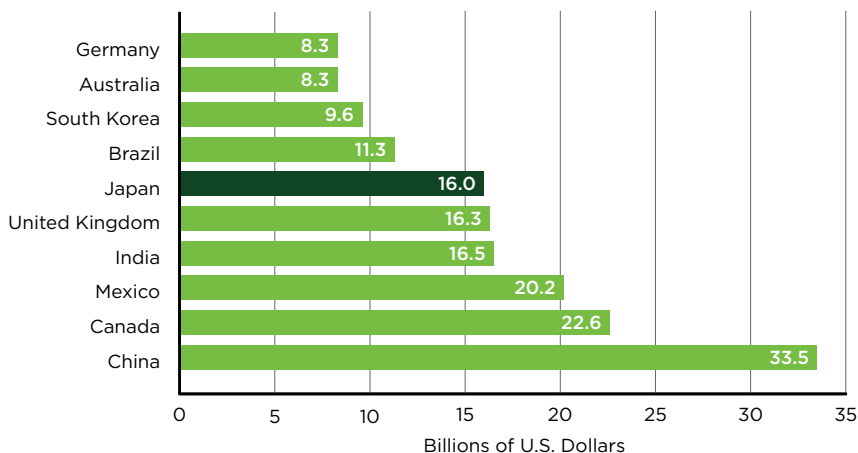
Photos: Tokyo (left), Gokayama (right)

Source: U.S. Department of Commerce, National Travel and Tourism Office



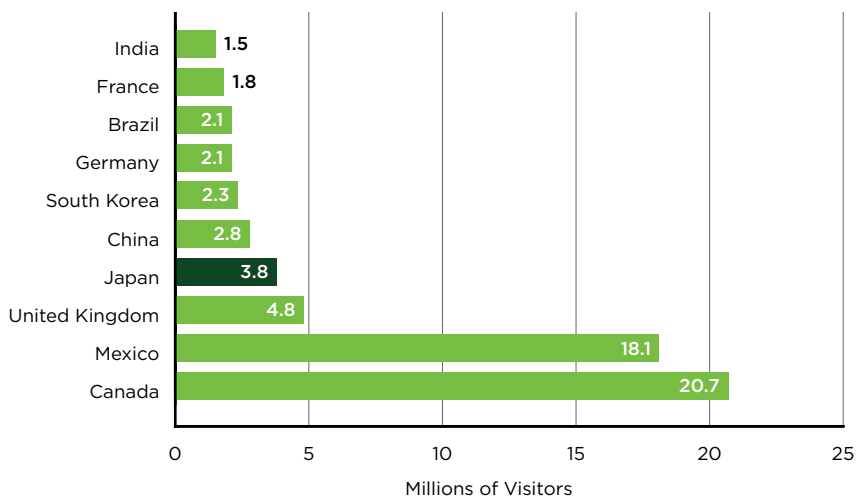
Inbound Travel Trends

Visitor Spending



International Arrivals to the USA

Top 10 Countries Generating Travel to the United States (Long-Haul Arrivals)



Source: U.S. Department of Commerce, National Travel and Tourism Office

Traveler Characteristics

Main Purpose of Trip

Main Purpose of Trip	2018 (%)	2019 (%)
Vacation/Holiday	71.3	71.0
Business	13.3	12.1
Visit Friends/Relatives	7.7	7.9
Convention/Conference/Trade Show	5.2	6.3
Education	2.0	1.8
Religion/Pilgrimages	0.3	0.4
Health Treatment	0.1	0.0
Other	0.3	0.3

All Purposes of Trip

Purpose of Trip	2018 (%)	2019 (%)
Vacation/Holiday	74.6	75.2
Business	15.6	14.5
Visit Friends/Relatives	11.9	12.3
Convention/Conference/Trade Show	6.1	7.6
Education	2.9	3.2
Religion/Pilgrimages	0.4	0.6
Health Treatment	0.1	0.2
Other	0.4	0.5
NET PURPOSES OF TRIP		
Leisure & Visit Friends and Relatives	80.6	81.4
Business & Convention	20.1	20.2

Select Traveler Characteristics

Traveler Characteristics	2018	2019
Length of Stay in USA (Mean nights)	6.6	6.6
Length of Stay in USA (Median nights)	4	4
First International Trip to the USA	25.2%	26%

Source: U.S. Department of Commerce, National Travel and Tourism Office

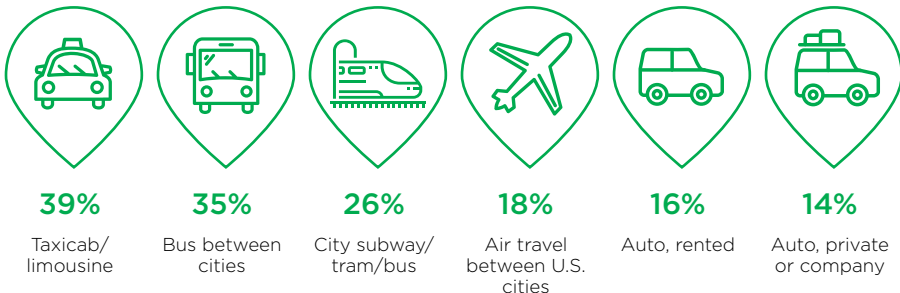


U.S. Destinations Visited (States, Cities, and Regions)

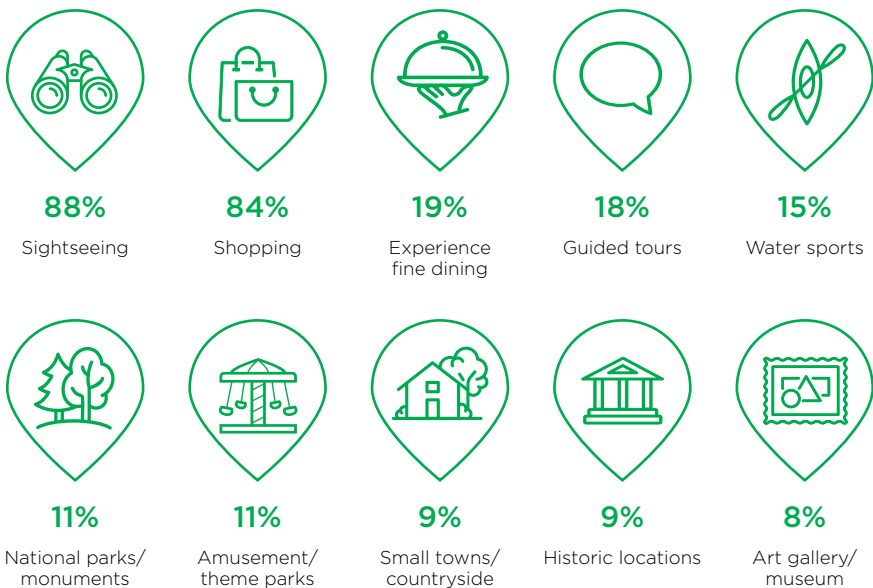
U.S. Destinations/Regions	2018 (%)	2019 (%)
REGIONS		
Pacific Islands	62.06	64.66
Pacific	16.97	15.79
New England	1.46	1.35
Middle Atlantic	9.41	9.03
South Atlantic	5.17	5.16
East North Central	4.10	3.42
West South Central	2.14	2.26
Mountain	4.55	4.70
STATES/TERRITORIES		
Illinois	1.52	1.67
New York	8.48	7.25
Arizona	1.34	1.38
Nevada	2.70	3.08
Massachusetts	1.31	1.18
California	15.69	14.91
Guam	16.01	18.78
Hawaii	45.99	45.76
Florida	2.30	2.13
Texas	1.91	1.86
Washington, DC	1.46	1.41
East South Central	1.12	0.97
CITIES		
Honolulu & Oahu	40.31	41.01
New York City	8.21	7.07
Anaheim-Santa Ana	2.90	3.11
Los Angeles	7.42	7.14
San Diego	1.39	1.83
San Francisco	4.64	3.62
Las Vegas	2.36	2.81
Chicago	1.36	1.58

Source: U.S. Department of Commerce, National Travel and Tourism Office

Transportation Used in the USA



Activity Participation While in the USA



Source: U.S. Department of Commerce, National Travel and Tourism Office

Air Travel Information



Non-Stop Flights from Japan to the USA

Airline	Flights From	Flights To	Depart. Time	Arrival Time	Frequency (week)
All Nippon Airways	Tokyo (Haneda)	Chicago	10:40	08:30	7 (resuming flights on Jul. 1)
All Nippon Airways	Tokyo (Haneda)	Honolulu	22:00	10:20	7 (suspended until Jul. 31)
All Nippon Airways	Tokyo (Haneda)	Houston	10:20	08:40	7 (suspended until Jul. 31)
All Nippon Airways	Tokyo (Haneda)	Los Angeles	21:05	15:05	7 (suspended until Jul. 31)
All Nippon Airways	Tokyo (Haneda)	Los Angeles	22:55	16:45	7 (suspended until Jul. 31)
All Nippon Airways	Tokyo (Haneda)	New York (JFK)	10:20	10:15	7 (suspended until Jul. 31)
All Nippon Airways	Tokyo (Haneda)	San Francisco	22:55	16:25	3
All Nippon Airways	Tokyo (Haneda)	San Jose	17:00	10:25	7 (suspended until Jul. 31)
All Nippon Airways	Tokyo (Haneda)	Seattle	21:05	14:15	4 (suspended until Jul. 31)
All Nippon Airways	Tokyo (Haneda)	Washington, DC	10:55	10:35	4 (suspended until Jul. 31)
All Nippon Airways	Tokyo (Narita)	Chicago	17:10	14:55	7 (daily)
All Nippon Airways	Tokyo (Narita)	Honolulu	20:20	08:40	7 (suspended until Jul. 31)
All Nippon Airways	Tokyo (Narita)	Honolulu	21:35	09:55	7 (suspended until Jul. 31)
All Nippon Airways	Tokyo (Narita)	Los Angeles	16:05	10:00	7 (daily)

Flights **NOT** affected by COVID-19

Photos: Kyoto (left); Tokyo (right)

Source: Brand USA Proprietary Research

Airline	Flights From	Flights To	Depart. Time	Arrival Time	Frequency (week)
All Nippon Airways	Tokyo (Narita)	Los Angeles	17:05	11:00	7 (suspended until Jul. 31)
All Nippon Airways	Tokyo (Narita)	New York (JFK)	16:40	16:35	2 (until Jul. 31)
All Nippon Airways	Tokyo (Narita)	San Francisco	17:10	10:35	3 (until Jul. 31)
American Airlines	Tokyo (Haneda)	Dallas/Fort Worth	18:15	16:15	7 (suspended until Jul. 31)
American Airlines	Tokyo (Haneda)	Los Angeles	16:25	10:35	7 (suspended until Jul. 31)
American Airlines	Tokyo (Haneda)	Los Angeles	19:45	13:45	7 (suspended until Jul. 31)
American Airlines	Tokyo (Narita)	Dallas/Fort Worth	10:40	08:20	7 (suspended until Jul. 31)
American Airlines	Tokyo (Narita)	Dallas/Fort Worth	18:25	16:20	3 (until Jul. 31)
American Airlines	Tokyo (Narita)	Los Angeles	18:05	12:25	7 (suspended until Jul. 31)
Delta Airlines	Nagoya	Detroit	16:30	16:07	6 (suspended until Jul. 31)
Delta Airlines	Nagoya	Honolulu	20:00	08:50	3 (suspended until Jul. 31)
Delta Airlines	Osaka (Kansai)	Honolulu	21:00	10:09	3 (suspended until Jul. 31)
Delta Airlines	Osaka (Kansai)	Seattle	16:00	09:55	7 (suspended until Jul. 31)
Delta Airlines	Tokyo (Haneda)	Atlanta	16:30	16:00	5 (until Jul. 31)
Delta Airlines	Tokyo (Haneda)	Detroit	15:25	14:18	3 (until Jul. 31)
Delta Airlines	Tokyo (Haneda)	Honolulu	21:55	10:30	6 (suspended until Jul. 31)
Delta Airlines	Tokyo (Haneda)	Los Angeles	16:20	10:15	7 (suspended until Jul. 31)
Delta Airlines	Tokyo (Haneda)	Minneapolis	15:25	12:35	3 (suspended until Jul. 31)
Delta Airlines	Tokyo (Haneda)	Portland	18:25	11:38	7 (suspended until Jul. 31)
Delta Airlines	Tokyo (Haneda)	Seattle	16:45	09:40	3 (until Jul. 31)
Hawaiian Airlines	Fukuoka	Honolulu	20:40	09:30	4 (suspended until Jul. 31)



Airline	Flights From	Flights To	Depart. Time	Arrival Time	Frequency (week)
Hawaiian Airlines	Nagoya	Honolulu	22:05	10:55	7 (suspended until Jul. 31)
Hawaiian Airlines	Osaka (Kansai)	Honolulu	20:45	09:45	7 (suspended until Jul. 31)
Hawaiian Airlines	Sapporo (Chitose)	Honolulu	19:45	08:10	3 (suspended until Jul. 31)
Hawaiian Airlines	Tokyo (Haneda)	Honolulu	20:15	08:50	7 (suspended until Jul. 31)
Hawaiian Airlines	Tokyo (Haneda)	Honolulu	21:20	09:55	7 (suspended until Jul. 31)
Hawaiian Airlines	Tokyo (Haneda)	Honolulu	23:55	12:35	4 (suspended until Jul. 31)
Hawaiian Airlines	Tokyo (Haneda)	Kona	23:55	12:55	3 (suspended until Jul. 31)
Hawaiian Airlines	Tokyo (Narita)	Honolulu	21:00	09:30	7 (suspended until Jul. 31)
Japan Airlines	Nagoya	Honolulu	22:10	11:00	7 (suspended until Jul. 31)
Japan Airlines	Osaka (Kansai)	Honolulu	22:15	11:20	7 (suspended until Jul. 31)
Japan Airlines	Osaka (Kansai)	Honolulu	22:20	11:30	7 (suspended until Jul. 31)
Japan Airlines	Osaka (Kansai)	Los Angeles	17:25	11:45	4 (suspended until Jul. 31)
Japan Airlines	Tokyo (Haneda)	Chicago	11:45	09:30	3 (until Jul. 31)
Japan Airlines	Tokyo (Haneda)	Dallas/Fort Worth	10:55	08:25	2 (until Jul. 31)
Japan Airlines	Tokyo (Haneda)	Honolulu	21:15	09:55	7 (suspended until Jul. 31)
Japan Airlines	Tokyo (Haneda)	Honolulu	22:00	10:30	7 (suspended until Jul. 31)
Japan Airlines	Tokyo (Haneda)	Los Angeles	17:00	10:50	7 (suspended until Jul. 31)
Japan Airlines	Tokyo (Haneda)	New York (JFK)	10:40	10:35	2 (until Jul. 31)
Japan Airlines	Tokyo (Haneda)	San Francisco	19:50	13:10	4 (suspended until Jul. 31)
Japan Airlines	Tokyo (Narita)	Boston	18:15	18:05	4 (suspended until Jul. 31)
Japan Airlines	Tokyo (Narita)	Guam	10:40	15:20	7 (suspended until Jul. 31)

Airline	Flights From	Flights To	Depart. Time	Arrival Time	Frequency (week)
Japan Airlines	Tokyo (Narita)	Honolulu	20:00	08:40	5 (suspended until Jul. 31)
Japan Airlines	Tokyo (Narita)	Honolulu	20:40	09:20	5 (suspended until Jul. 31)
Japan Airlines	Tokyo (Narita)	Kona	21:25	10:15	7 (suspended until Jul. 31)
Japan Airlines	Tokyo (Narita)	Los Angeles	17:25	11:15	1 (until Jul.31)
Japan Airlines	Tokyo (Narita)	New York (JFK)	18:10	18:20	7 (suspended until Jul. 31)
Japan Airlines	Tokyo (Narita)	San Diego	17:25	11:25	4 (suspended until Jul. 31)
Japan Airlines	Tokyo (Narita)	San Francisco	18:05	11:30	2 (until Jul.31)
Japan Airlines	Tokyo (Narita)	Seattle	18:05	11:15	4 (suspended until Jul. 31)
Jeju Air	Osaka (Kansai)	Guam	10:10	14:50	7 (suspended until Jul. 31)
Jeju Air	Tokyo (Narita)	Guam	10:05	15:00	7 (suspended until Jul. 31)
Korean Air	Tokyo (Narita)	Honolulu	21:20	10:00	7 (suspended until Jul. 31)
Singapore Airlines	Tokyo (Narita)	Los Angeles	19:00	13:10	7 (suspended until Jul. 31)
Skymark Airlines	Tokyo (Narita)	Saipan	10:15	15:00	7 (suspended until Jul. 31)
Trans World Airlines	Osaka (Kansai)	Guam	10:40	15:10	7 (suspended until Jul. 31)
United Airlines	Fukuoka	Guam	11:50	16:50	7 (suspended until Jul. 31)
United Airlines	Nagoya	Guam	08:55	01:35	7 (suspended until Jul. 31)
United Airlines	Nagoya	Guam	11:30	16:05	7 (suspended until Jul. 31)
United Airlines	Osaka (Kansai)	Guam	11:05	15:50	3 (suspended until Jul. 31)
United Airlines	Osaka (Kansai)	Guam	21:00	01:30	7 (suspended until Jul. 31)
United Airlines	Osaka (Kansai)	San Francisco	16:50	11:10	5 (suspended until Jul. 31)
United Airlines	Tokyo (Haneda)	Chicago	17:45	15:55	5 (until Jul. 31)



Airline	Flights From	Flights To	Depart. Time	Arrival Time	Frequency (week)
United Airlines	Tokyo (Haneda)	Los Angeles	18:20	12:25	7 (suspended until Jul. 31)
United Airlines	Tokyo (Haneda)	Newark (EWR)	17:15	17:10	7 (daily)
United Airlines	Tokyo (Haneda)	San Francisco	15:45	09:20	5 (until Jul. 31)
United Airlines	Tokyo (Haneda)	Washington, DC	16:00	15:40	7 (suspended until Jul. 31)
United Airlines	Tokyo (Narita)	Denver	18:00	13:35	7 (suspended until Jul. 31)
United Airlines	Tokyo (Narita)	Guam	11:00	15:40	7 (suspended until Jul. 31)
United Airlines	Tokyo (Narita)	Guam	17:35	22:30	3 (until Jul. 23) & 7 (daily, starting Jul. 24)
United Airlines	Tokyo (Narita)	Guam	21:05	01:45	7 (suspended until Jul. 31)
United Airlines	Tokyo (Narita)	Honolulu	18:55	07:25	7 (suspended until Jul. 31)
United Airlines	Tokyo (Narita)	Houston	16:35	14:45	7 (suspended until Jul. 31)
United Airlines	Tokyo (Narita)	Los Angeles	17:00	11:00	7 (suspended until Jul. 31)
United Airlines	Tokyo (Narita)	Newark (EWR)	17:00	16:45	7 (daily, starting Jul. 6)
United Airlines	Tokyo (Narita)	San Francisco	17:05	10:40	7 (daily)

Flights **NOT** affected by COVID-19

Market Snapshot



Sales Distribution

Japan has a highly regulated travel distribution system that includes three levels of travel agencies. Major operators in Japan's travel industry are involved in all levels of the distribution system.

- **Type 1 agencies** provide package, wholesale, and retail services for international and domestic travel products. A typical agency in this category has wholesale, media sales, group tour sales, and retail divisions.
- **Type 2 agencies** take international travel products from Type 1 agencies and sell them directly to consumers. They do not produce their own overseas travel products, though they do produce and sell domestic tours.
- **Type 3 agencies** sell the international and domestic packages produced by Type 1 and Type 2 agencies. They do not have wholesale or packaging divisions.

Revenue of the Top 50 Japanese Travel Companies

- The combined revenue of Japan's top 50 travel companies increased 1.6 percent—totaling JPY5.14 trillion, or USD47.5 billion, over a 12-month period ending in March 2019, compared to the previous 12 months.
- Strong growth continued in all travel sectors, with the outbound sector seeing a 5 percent increase to a revenue of USD19.3 billion.

Photos: Kyoto (left), Mt. Rokko (right)



Type of Travel	Revenue (USD) (Apr 2018–Mar 2019)	Revenue (USD) (Apr 2017–Mar 2018)	Y-o-Y Change
Outbound	\$19.3 billion	\$18.3 billion	+5%
Inbound	\$2.1 billion	\$1.9 billion	+12.9%
Domestic	\$26 billion	\$26.4 billion	-1.6%
Total	\$47.5 billion	\$46.8 billion	+1.6%

Sources: Japan Tourism Agency, Ministry of Land, Infrastructure, Transport and Tourism

Distribution Trends

- Major Japanese companies control all levels of the distribution system. Although distribution channels are becoming more fragmented, this integration remains a key feature of the Japanese travel trade. Large wholesalers are increasing their focus on retail consultants to meet consumer demand for Free and Independent (FIT) travel.
- In addition to the two major brochure seasons of Kamiki (April to September) and Shimoki (October to March), wholesalers have begun packaging tours on-demand, taking advantage of last-minute trends and peak or low travel periods.
- The number of online-only businesses in Japan is increasing, and major wholesalers are expanding online services and advertising. Japanese travel agents are rapidly shifting their focus from group tours to FIT travel as Japanese travelers become more experienced.
- The ratio of FIT travelers as a proportion of all outbound travelers hit a record high of USD20 million in 2019. A total of 43 percent of travelers made travel bookings online in 2019, and this is projected to be 44 percent in 2020, so Japanese travel agents are gradually moving resources from brick and mortar sales to sales via their websites.
- At the same time, there is recent evidence that traditional stores are still important as a place for consumers to consult travel professionals, particularly for young consumers with less experience who want advice on recommended destinations, travel activities, and products that provide the best value for their money.

Japanese travel agents are rapidly shifting their focus from group tours to FIT travel as Japanese travelers become more experienced.

Key Travel Trade Events in 2020

- **JATA Tourism Expo 2020:** Okinawa Convention Center, October 29-November 1
- **JATA Tourism Expo 2020:** Tokyo Business Meetings, postponed to January 2021

Booking Tendencies

The most popular method of making travel reservations was the “Internet,” at 63.2 percent, its highest ever rating. It was followed by “travel agency outlets” at 17 percent, and “mail order and telephone” at 7.8 percent, both at the same level year on year.

Turning to methods of reservation by travel purpose, Internet remained the main resource for tourism, visiting family and friends, and attending conferences. However, 64.6 percent of honeymoons were booked through travel agency outlets, a higher percentage than the previous year.

Percentage of Reservations Made (By Booking Method)



Japanese Styles of Travel

In 2018, 27.9 percent of Japanese traveled overseas with their partner, down slightly from 28.2 percent in 2017. Families travelling increased 0.5 percent year-over-year. The majority of Japanese prefer to travel in small groups of one to three people.

Sources: JTB Report 2019, AB Road Research Center



Style of Travel	2017 (%)	2018 (%)
Married Couple	28.2	27.9
Single Traveler	17.0	16.3
Family with Children	14.1	14.6
With a Friend (2 people)	11.3	11.0
With Friends (3 people or more)	9.6	9.0
Travel with Parents	6.2	7.1
Couple Travel	4.9	4.9
3-Generation Family Travel	3.2	3.2
Other	5.4	5.2

Japanese Travelers

Taiwan remains the destination most traveled to by Japanese consumers, followed by South Korea and Hawaii (Oahu) for a second year in 2018.

USA West Coast climbed up to sixth place, from ninth year-on-year indicated a stronger interest in USA overall in 2018.

2018	2017	Top Destinations for Japanese Travelers	(%)	% Change
1st	1st	Taiwan	16.3	-1.2
2nd	3rd	South Korea	13.6	2.4
3rd	2nd	Hawaii (Oahu)	13.4	-0.2
4th	4th	Hong Kong	7.6	-0.5
5th	5th	Thailand (other than beach resorts)	6.8	0.9
6th	6th	USA West Coast	5.6	0.2
7th	7th	Singapore	5.4	0.1
=	8th	France	5.4	0.6
=	7th	Western Europe (excluding France, Spain, Italy, Germany)	5.4	0.1
8th	9th	Australia	5.3	0.6
9th	7th	Italy	5.1	-0.2
10th	-	Guam	5.0	-0.6

Source: AB Road Research Center

What Influences Japanese Travelers' Travel Making Decisions?

Japanese consumers make their travel destination decisions based on multiple factors, including:

- Safety concerns
- Financial factors (strength of the Japanese Yen, fuel surcharges etc.)
- Compatibility of local cuisine with Japanese tastes
- Ease of communication at the destination
- Value of travel as a life experience

Japanese Travelers' Destination Satisfaction

Two regions of the USA feature in the top 10 destinations: USA South and USA West Coast in joint sixth place. A rise in Europe (Spain and other Western European countries), South East Asia (Indonesia), and Oceania destinations (New Zealand) have risen to the top 5 in 2018.

Satisfaction Rankings 2018	2017	Destinations	% of Japanese satisfied with trip
1st	3rd	Spain	100
2nd	-	Indonesian Cities	96.8
3rd	4th	Western Europe (excluding France, Spain, Italy, Germany)	94.7
4th	-	Macau	94.6
=	-	Taiwan	94.6
=	-	New Zealand/other Oceania	94.6
5th	-	Bangkok and other Thai Cities	94.5
6th	1st	USA South	94.2
=	8th	USA West Coast	94.2
7th	-	Australia	93.5
8th	-	Other Asia	93.4
9th	-	Vietnam	93.3
10th	10th	Italy	92.7
=	-	Other European Countries	92.7

Source: AB Road Research Center



Technology and Media Consumption

Distinctive characteristics of Japanese mass media consumption (2018)

Weekday Media Consumption

Consumer Demographic (years)	Media Channel (mins/weekday)				
	TV Realtime	TV	Internet	Newspaper	Radio
10-19	71.8	12.7	167.5	0.3	0.2
20-29	105.9	18.7	149.8	1.2	0.9
30-39	124.4	17.4	110.9	3.0	9.4
40-49	150.3	20.2	119.7	4.8	16.6
50-59	176.9	20.8	104.3	12.9	17.2
60-69	248.7	27.3	60.9	23.1	22.8
Average	156.8	20.3	112.4	8.7	13.0

Weekend/Day Off Media Consumption

Consumer Demographic (years)	Media Channel (mins/weekend)				
	TV Realtime	TV	Internet	Newspaper	Radio
10-19	113.4	28.6	271.0	0.9	0.7
20-29	151.0	32.8	212.9	2.1	2.1
30-39	187.2	26.6	150.2	3.5	3.9
40-49	213.9	39.0	145.3	6.4	8.2
50-59	280.8	22.9	115.0	15.3	10.4
60-69	315.3	34.5	54.3	26.1	14.3
Average	219.8	31.3	145.8	10.3	7.3

Source: Ministry of Internal Affairs and Communication

Television Usage

Television is still the main source of news and entertainment for the Japanese. The average person watches 2 hours and 40 minutes of television per weekday and 3 hours and 40 minutes per weekend day or day off.

The 60-69 year-old watched the most real-time TV at 248 minutes (weekdays) and 315.3 minutes (weekends) respectively, whereas a 10-19 year-old consumer the most time online at 167.5 minutes (weekdays) and 271 minutes (weekends).

Smartphone Usage

There are 109 million Japanese, 87 percent of whom own a smartphone, 20.7 percent own a feature phone, and 37.1 percent own a tablet (vs 34.3% percent). Tablet usage increased 2.8 percent in all segments except those aged 20-29.

Ownership rate of smartphones is highest at 99 percent among those aged 20-29, followed by 30-39 at 97.7 percent and 40-40 at 94.4 percent. Ownership is the lowest among 60-60 at 60.5 percent.

Internet Usage

According to Ministry of Internal Affairs and Communication, Japanese users spend an average of 34 minutes online using a PC on weekdays and 27.5 minutes on weekends. They spend 1 hour and 12 minutes using a mobile phone on weekdays and 1 hour and 37 minutes on weekends.

Internet connection speeds is ranked sixth globally at 78.0 MBPS; first is Singapore at 161.2 MBPS and second is Hong Kong at 141.6 MBPS.

Internet Travel Searches

An estimated 72 percent of Japanese outbound travelers refer to information on the internet before making reservations in 2018. The most popular sources of information are online travel agencies' websites (47 percent), followed by airlines' websites (25 percent), and the websites of traditional travel agencies that have physical stores (23 percent).

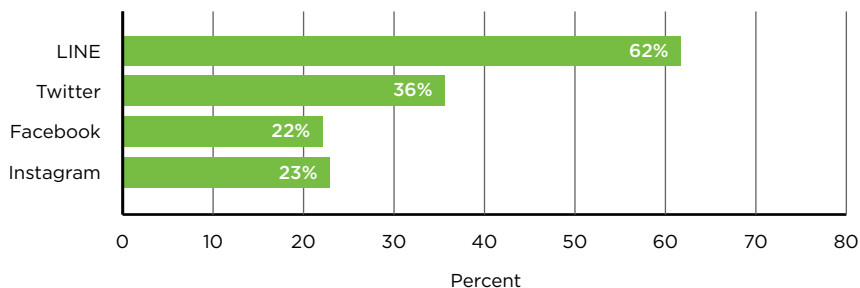


Social Media

By far the most popular social media application in Japan is LINE, a social messaging service similar to WhatsApp and Facebook Messenger at 71 million monthly active users.

Worldwide leaders Facebook, Twitter, and YouTube also dominate market share, but Japanese users also continue to embrace home-grown platforms. While the majority of middle-aged Japanese are now familiar with Facebook and Twitter, image-sharing applications such as Instagram and Tumblr are gaining momentum with younger generations

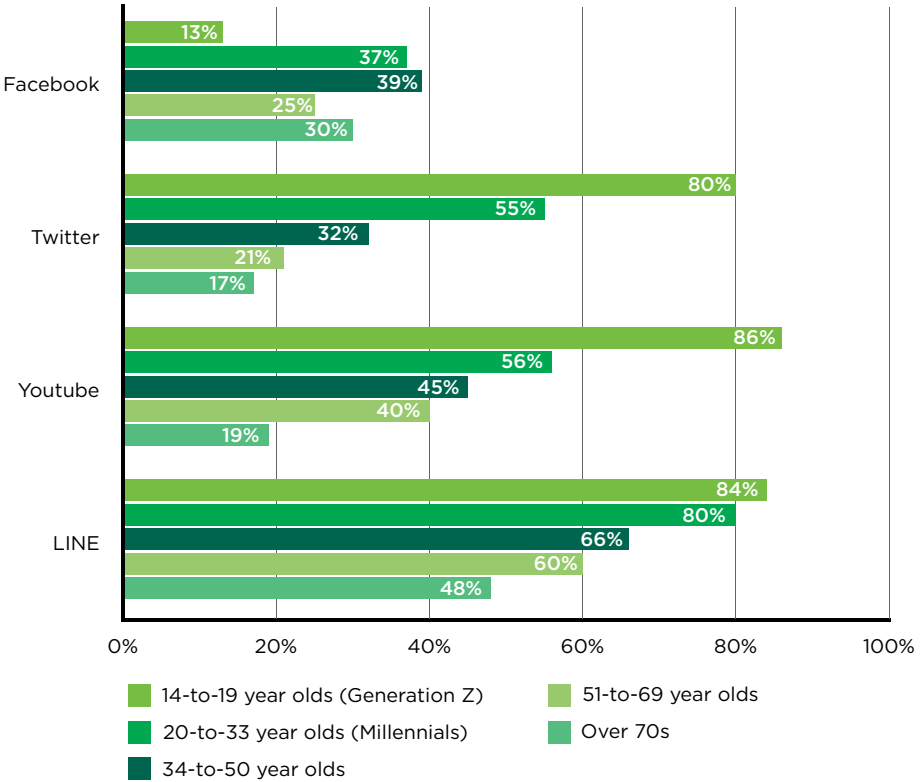
Japanese Social Media Users (January 2019)



Social Media Usage

According to social media management platform Hootsuite in 2018, the average amount of time that Japanese spend using online social media per day is 48 minutes, compared to an average of 26 minutes browsing web pages, but this rate varies greatly by generation. While Japanese aged 10-29 spending an average of 46.6 minutes on online social media platforms, Japanese aged 30-59 spend an average of just 7.5 minutes.

Social Media Use by Age



LINE

- A smart phone application that has an estimated 78 million users in Japan, making it Japan`s most popular social messaging network. It accommodates 92.8 percent of the country`s mobile users per year.
- LINE is arguably the most powerful B2C social network. It recently launched a new booking service “LINE Travel” in mid-2018. Both Japanese and overseas corporations are creating official accounts to communicate directly with consumers and offer them stamps and special offers.



Facebook

- Estimated to have 28 million active monthly users in Japan, with the highest activity of those aged 30+ (74.2 percent) with 56.3 percent usage among male users.
- Top 5 industries on Facebook are E-commerce with 21.5 million fans, services with 11 million, retail with 10.8 million, fashion with 10.5 million, and auto with 9.1 million fans.

Twitter

- Estimated to have 45 million active monthly users in Japan since the beginning of 2019, with a highest user activity of those aged 30+ at 61.3 percent. Japanese is the second most tweeted language in the world after English.

Instagram

- Estimated to have 29 million monthly active users (January 2019), Instagram has experienced the fastest growth rate among social media platforms in Japan in the past few years, with predominantly female users at 56.4 percent and males accounting for 43.6 percent of usage.

Sources of Information for Finding Package Tours

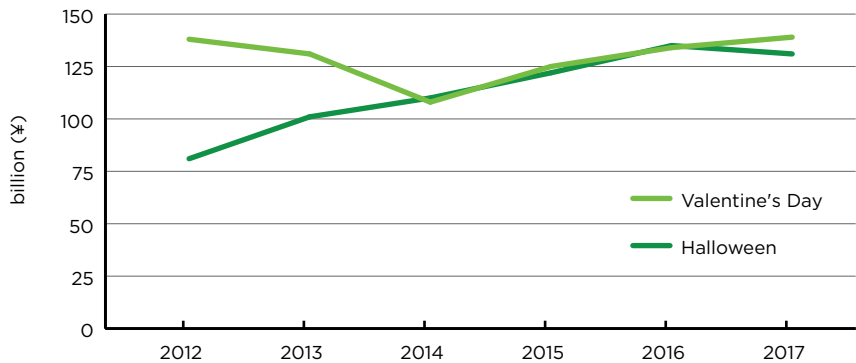
While the amount of time the Japanese spend browsing the internet using handheld devices now exceeds the amount spent using a desktop computer, when it comes to conducting detailed research on package tours, desktop computers are still the preferred choice.

Source of Information	(%)
Internet Accessed by Desktop Computers	38.5
Travel Agency Counters	10.4
Internet Accessed by Smartphone/Tablet, etc.	11.7
Email Magazines Sent by Travel Agencies or Airlines	2.2
Travel with Parents	2.1

U.S. Culture in Japan

In recent years, Halloween has been growing increasingly popular and widespread in Japan, rivaling Christmas and Valentine's Day.

Size of the Halloween and Valentine's Day Markets in Japan



According to the Japan Anniversary Association, which registers and tracks commemoration days, the 2016 market for everything from shopping to Halloween-themed dining reached JPY135 billion (USD1.2 billion), even surpassing Valentine's Day (JPY134 billion) spending that year.

Halloween merchandise is readily available in stores throughout the country beginning in September, from fancy dress outfits to confectionery and stationery lines.

More than 10 events were held in Tokyo alone, including a pumpkin parade, and theme parks generate interest in the festival through Halloween special events.

Japanese interest in popular American holidays seems set to increase as Easter is also starting to be recognized more widely.

Brand USA Resources



Online Channels

Digital Marketing/Social Media

The majority of the USA Campaigns are driven by digital marketing strategies to engage, inspire, and prompt international travelers to visit the United States. A variety of channels and methods are used, including:

- Proprietary website platforms
- Social media channels
- Global digital marketing and social campaigns
- Rich media
- Targeted advertising

Proprietary Consumer Website Platforms

Brand USA has two online consumer identities in the marketplace:

- VisitTheUSA (VisitTheUSA.com), which includes a global site in English plus in-language sites in most markets where Brand USA markets the United States to international travelers
- GoUSA, which is active in Asian markets, including China and Hong Kong (GoUSA.cn), Taiwan (GoUSA.tw), India (GoUSA.in), Japan (GoUSA.jp), and South Korea (GoUSA.or.kr)

Together, the VisitTheUSA and GoUSA website platforms are the consumer-facing online identities international travelers associate with travel to the United States.

Photos: Tokyo (left); Tohoku (right)

Social Media Channels

In addition to the global and in-market VisitTheUSA and GoUSA proprietary websites, Brand USA leverages related social media accounts in consumer-facing content and communications. Each market where Brand USA has a fully developed marketing presence has dedicated, in-language website and social channels, which Brand USA uses to reach consumers in its target markets.

The following handles are used for global, consumer-facing promotions in English:

- **Website:** [VisitTheUSA.com](https://www.VisitTheUSA.com)
- **Twitter:** [@VisitTheUSA](https://twitter.com/VisitTheUSA)
- **Facebook:** [Facebook.com/VisitTheUSA](https://www.facebook.com/VisitTheUSA)
- **YouTube:** [YouTube.com/VisitTheUSA](https://www.youtube.com/VisitTheUSA)
- **Instagram:** [VisitTheUSA](https://www.instagram.com/VisitTheUSA)

The following campaign hashtags support global and thematic promotions and initiatives:

- **Global:** [#VisitTheUSA](https://twitter.com/VisitTheUSA)
- **Great Outdoors:** [#OutdoorsUSA](https://twitter.com/VisitTheUSA)
- **Flavors/Culinary:** [#TasteUSA](https://twitter.com/VisitTheUSA)
- **Market the Welcome:** [#USAWelcome](https://twitter.com/VisitTheUSA)
- **Road Trips:** [#RoadTripUSA](https://twitter.com/VisitTheUSA)

In addition to leveraging these global channels, Brand USA currently has localized social media efforts in the following markets via the channels shown in the Digital Channels chart on the following page.



Digital Channels

Market	URL	Local Tagline	Channels	Hashtag
Australia	VisitTheUSA.com.au	Plan Your USA Trip Now	@VisitTheUSA @VisitTheUSA	facebook.com/VisitTheUSAau YouTube.com/VisitTheUSA #VisitTheUSA
Brazil	VisiteosUSA.com.br	Planeje Sua Viagem Aos USA Agora Mesmo	@VisiteOsUSA @VisitTheUSA	facebook.com/VisiteOsUSA YouTube.com/VisiteOsUSA #VisiteOsUSA
Canada: English	VisitTheUSA.ca	Plan Your USA Trip Now	@VisitTheUSAcA @VisitTheUSA	facebook.com/VisitTheUSAcA YouTube.com/VisitTheUSA #VisitTheUSA
Canada: French	fr.VisitTheUSA.ca	Planifiez Votre Voyage Aux USA Dès Maintenant	@VisitTheUSAcA @VisitTheUSA	facebook.com/VisitTheUSAcA YouTube.com/VisitTheUSAFr #VisitTheUSA
Chile	VisitTheUSA.cl	Planifica tu viaje a USA ahora	@VisitTheUSAes @VisitTheUSA	facebook.com/VisitTheUSACL YouTube.com/VisitTheUSAes #VisitTheUSA
China	GoUSA.cn	即刻 定制 您的 USA 旅行 计划	<p>Sina Weibo (Chinese microblogging site/hybrid of Twitter and Facebook): http://weibo.com/GoUSAcn</p> <p>Tencent Weibo (Chinese microblogging site): http://t.qq.com/DiscoverGoUSA</p> <p>Youku (YouTube equivalent): http://i.youku.com/gousacn</p> <p>Weishi (Vine equivalent): http://www.weishi.com/u/23484775</p> <p>Wechat (Chinese mobile social network for texting, images, music and articles sharing, mobile only): 美国国家旅游局</p> <p>Lofter (Photo sharing platform): http://GoUSA.lofter.com</p>	#VisitTheUSA
Colombia	VisitTheUSA.co	Planifica tu viaje a USA ahora	@VisitTheUSAes @VisitTheUSA	facebook.com/VisitTheUSACo YouTube.com/VisitTheUSAes #VisitTheUSA
France	VisitTheUSA.fr	Préparez Votre Voyage Aux USA Dès Maintenant	@VisitTheUSAFr @VisitTheUSA	facebook.com/VisitTheUSAFr YouTube.com/VisitTheUSAFr #VisitTheUSA
Germany	VisitTheUSA.de	Plant Jetzt Eure Reise In Die USA	@VisitTheUSA @VisitTheUSA	facebook.com/VisitTheUSADe YouTube.com/VisitTheUSADe #VisitTheUSA
Global	VisitTheUSA.com	Plan Your USA Trip Now	@VisitTheUSA @VisitTheUSA	facebook.com/VisitTheUSA YouTube.com/VisitTheUSA #VisitTheUSA
India	GoUSA.in	Plan Your USA Trip Now	@GoUSAin @VisitTheUSA	facebook.com/GoUSAin YouTube.com/GoUSAin #USATrip
Japan	GoUSA.jp	今すぐ USAへの 旅の 計画を	@GoUSAjp @VisitTheUSA	facebook.com/GoUSAjp YouTube.com/GoUSAjp アメリカ旅行
Mexico	VisitTheUSA.mx	Planifica Tu Viaje A USA Ahora	@VisitTheUSAes @VisitTheUSA	facebook.com/VisitTheUSAMx YouTube.com/VisitTheUSAes #VisitTheUSA
Korea	GoUSA.or.kr	지금 USA 여행을 계획해보세요	@GoUSAkr @VisitTheUSA	facebook.com/GoUSAkr YouTube.com/GoUSAkr #미국여행
Sweden	VisitTheUSA.se	Plan Your USA Trip Now	@VisitTheUSA @VisitTheUSA	facebook.com/VisitTheUSAse YouTube.com/VisitTheUSA #VisitTheUSA
Taiwan	GoUSA.tw	N/A	N/A	facebook.com/GoUSA.official N/A
United Kingdom	VisitTheUSA.co.uk	Plan Your USA Trip Now	@VisitTheUSAuk @VisitTheUSA	facebook.com/VisitTheUSAuk YouTube.com/VisitTheUSA #VisitTheUSA

GoUSA_{TV} Available on Roku, Apple TV, Amazon Fire, iOS, and Android. Also accessible via GoUSATV.com and YouTube.

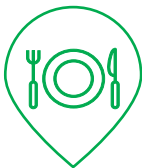
Brand USA Traveler Research

In the summer of 2013, Brand USA launched its Global Market Intelligence program. As part of this program, Brand USA commissioned PhoCus Wright, Inc. to conduct proprietary consumer research in various international markets. Respondents were recruited from an online panel. For markets beyond North America, the results reflect responses from adults who travel outside of their continent for leisure. The Global Market Intelligence program is designed to gain insight into travelers' perceptions of the USA and its competitors, as well as general travel behaviors and preferences.

Top Five Motivations for Selecting Last Intercontinental Destination

Question: What motivates your desire to visit that destination? Select all that apply (N=1078).

Base: Japan Intercontinental travelers.



65%

Dining/
gastronomy



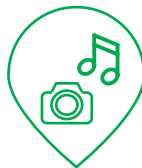
56%

Cultural/historic
attractions



45%

Shopping



32%

Local lifestyle



31%

Beaches/seaside
attractions

Top Five Strongest Impressions of the USA

For each of the following countries, select which characteristics, if any, describe it as a holiday destination. Select all that apply (N=1078). Base: Japan Intercontinental travelers.

48%

Diverse

47%

Energetic

32%

Friendly

23%

Optimistic

21%

Adventurous



Top Five Channels Used in Destination Selection for Last Intercontinental Trip

Question: What sources of information did/will you use to select the destination for this holiday?
Select all that apply. Base: Japan Intercontinental travelers (N=1078).



63%

Websites
via computer



39%

Information in
printed travel
guidebooks



34%

Websites/
applications
via mobile phone



32%

Websites/
applications
via tablet

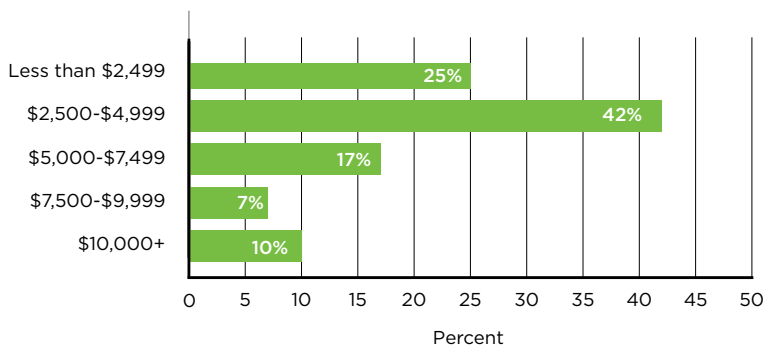


32%

Printed
publications,
articles, or
brochures

Expected Household Travel Spend for Next Intercontinental Trip

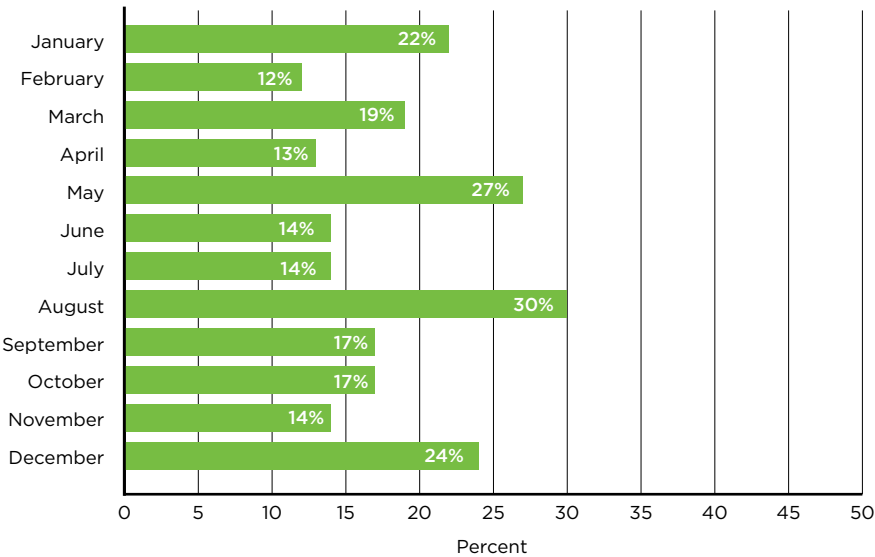
Question: What is the total amount you expect your household to spend on each of the following elements of this holiday? Enter a whole number without the currency symbol. Airline tickets/Lodging/ Additional trip-related expenses, such as dining, local transportation, souvenirs and local tours.
Base: Japan Intercontinental travelers (N=1078). Note: Totals may not add up to 100% due to rounding (Conversion JPY to USD= 0.009).



Mean: \$5,492 Median: \$3,604

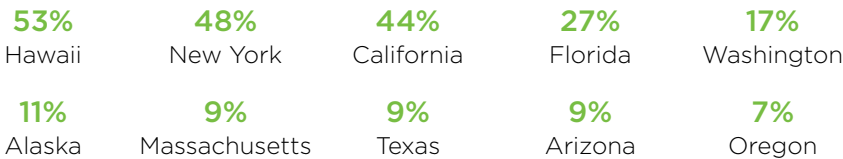
Months Traveled (March 2017–March 2019)

Question: During what month(s) did you take your holiday(s)? Base: Japan Intercontinental travelers (N=1078).



Destination Interest—Top 10 States

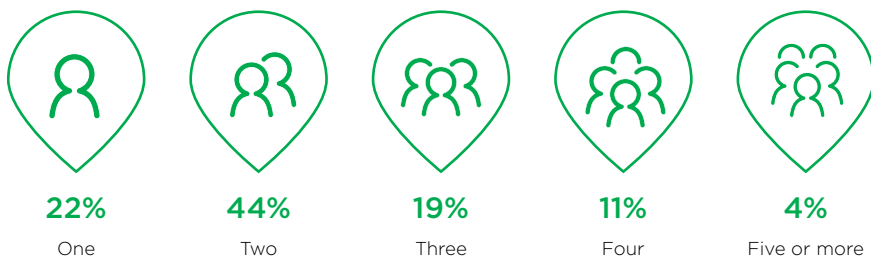
Question: You indicated in a previous question that you have interest in visiting the USA sometime in the future. Which U.S. state(s) are you interested in visiting? Base: Japan Intercontinental travelers with interest in visiting the United States (N=1026).





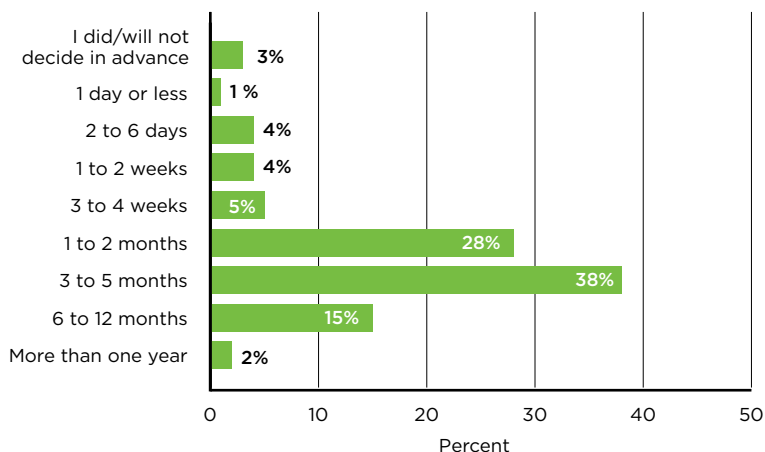
Expected Travel Party Size of Next Intercontinental Trip

Question: Who will travel with you on this holiday? Select all that apply. Base: Japan Intercontinental travelers (N=1078). Note: Totals may not add up to 100% due to rounding.



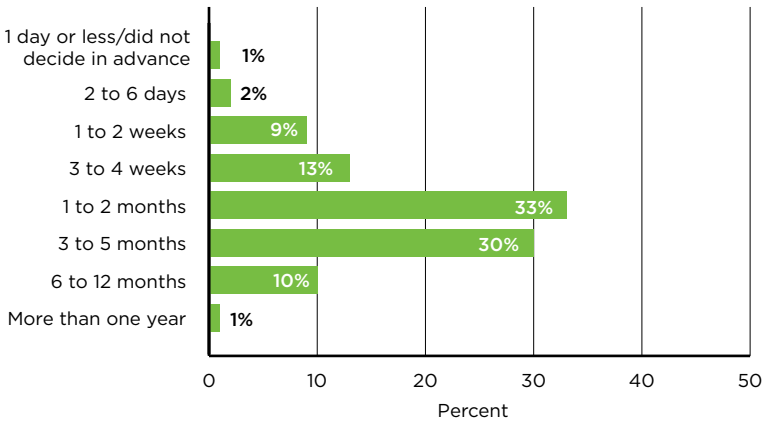
Destination Decision for Next International Trip

Question: How far in advance of your departure date did/will you decide on the destination? Base: Japan Intercontinental travelers (N=1078). Note: Totals may not add up to 100% due to rounding.



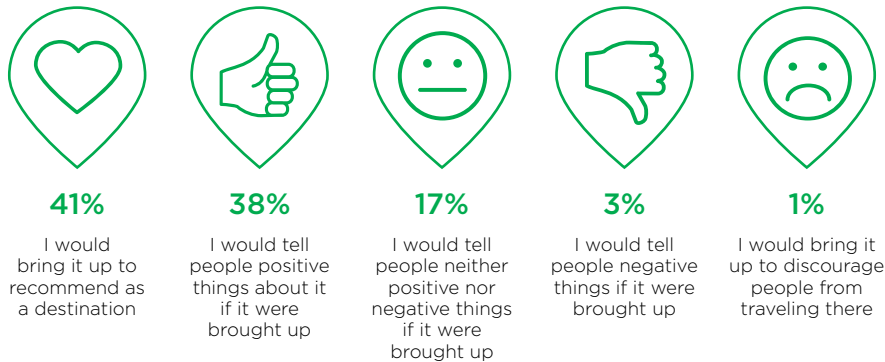
Air Booking for Next International Trip

Question: How far in advance of your departure date did/will you book the travel products for this holiday? Select one option from the drop-down box. Base: Japan Intercontinental travelers (N=1078). Note: Totals may not add up to 100% due to rounding.



Net Promoter

Question: United States of America: If a friend or relative were discussing a future holiday destination with you, which statement would best describe your attitude toward the following countries? Base: Japan Intercontinental travelers (N=1078). Note: Totals may not add up to 100% due to rounding.

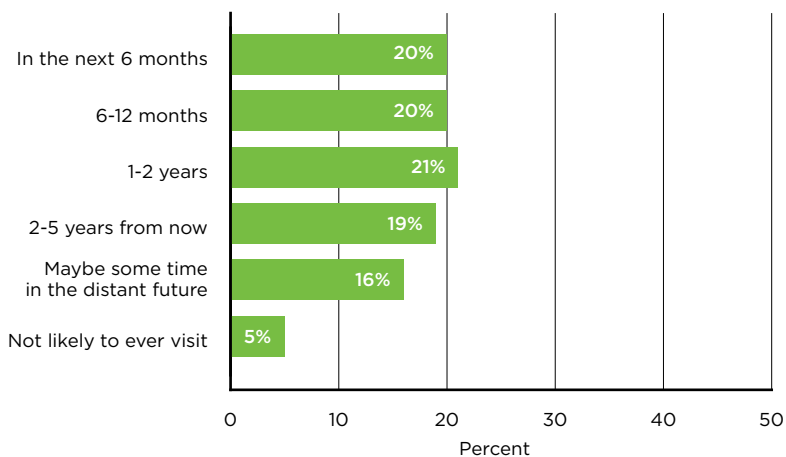


Source: Brand USA Market Intelligence Study 2019



Likelihood of Travel to the USA

Question: *When, if ever, are you likely to visit the following countries?* Base: Japan Intercontinental travelers (N=1078).



Highlights of Success

Over the past seven years, Brand USA's marketing efforts have generated...

7.5 million
incremental visitors



nearly
\$25 billion
incremental spending

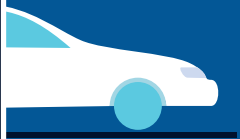
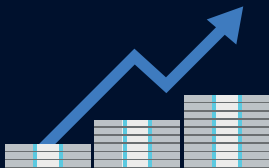


50,000+
incremental jobs
supported
each year

\$7.1 billion
federal, state &
local taxes



nearly
\$55 billion
total economic
impact





Brand USA Markets

Brand USA deploys its marketing efforts in a strategic combination of emerging and established markets that have the potential to drive the greatest returns in terms of visitation, spend, and market share.

Based on these market selection factors, Brand USA currently focuses the majority of its consumer marketing efforts in the following markets:

- Australia
- Brazil
- Canada
- Chile
- China
- Colombia
- France
- Germany
- India
- Japan
- Mexico
- South Korea
- Sweden
- United Kingdom

These 14 international markets generate more than 80 percent of inbound travel to the United States. In total, through the combined total of Brand USA's cooperative marketing platforms, contributed media, and trade outreach, the international marketing effort is present in more than 40 markets.

Brand USA Partnerships



Visit USA Committee, Japan

How Brand USA Works with Visit USA Committees

Brand USA works in collaboration with Visit USA committees around the world to promote the United States as a premier travel destination. These committees organize a wide range of promotional activity, including travel trade shows, workshops and training for travel agents and tour operators, roadshows with U.S. destinations, and more.

Visit USA committees are generally managed by voluntary members with an interest in promoting and selling travel to the United States. Brand USA collaborates with Visit USA committees and supports activities that align with Brand USA's objectives and marketing strategies. In addition, Brand USA makes use of the in-market expertise of Visit USA committees, both where Brand USA has representation and where it does not.

Visit USA Committee Japan

Kei Hirowaki

Chairman

Takahashi Mitsunori

Vice President

info@VisitUSA.jp

Photos: Tokyo (left); Kyoto (right)

Source: CIA World Factbook 2018, unless noted otherwise



About the U.S. Department of Commerce

Brand USA works in close concert with the U.S. Department of Commerce through the National Travel and Tourism Office (NTTO) and the U.S. Commercial Service.



The National Travel and Tourism Office (NTTO)

NTTO is the liaison between Brand USA and the federal government. The office works with Brand USA on behalf of the Secretary of Commerce, who appoints the Brand USA Board of Directors and approves Brand USA's annual objectives in consultation with the Secretary of State and the Secretary of Homeland Security. Additionally, NTTO facilitates the approval of matching funds for Brand USA and connects Brand USA to other federal agencies.

More broadly, NTTO creates a positive climate for growth in travel and tourism by reducing institutional barriers to tourism, administers joint marketing efforts, provides official travel and tourism statistics, and coordinates efforts across federal agencies through the Tourism Policy Council. The office works to enhance the international competitiveness of the U.S. travel and tourism industry and increase its exports, thereby creating U.S. employment and economic growth through:

- Management of the travel and tourism statistical system for assessing the economic contribution of the industry and providing the sole source for characteristic statistics on international travel to and from the United States;
- Design and administration of export expansion activities;
- Development and management of tourism policy, strategy and advocacy;
- Technical assistance for expanding this key export (international tourism) and assisting in domestic economic development.

Contact:

NTTO

International Trade Administration
U.S. Department of Commerce
1401 Constitution Avenue, NW
Washington, DC 20230
202.482.0140
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The U.S. Commercial Service

Brand USA works closely with the U.S. Commercial Service (USCS) to pursue our mutual objective of promoting the United States as the premier international travel destination.



The USCS is the trade promotion arm of the U.S.

Department of Commerce's International Trade

Administration. The USCS is a federal government agency with a domestic network of over 100 offices and a global network operating in over 75 countries. The mission of the USCS is to assist American companies in their export needs and to support foreign direct investment into the United States. As America's largest services export, travel and tourism is a key sector for the USCS.

The Commercial Service Global Travel and Tourism Team helps U.S. destinations and travel suppliers attract international visitors and grow international arrivals. This assistance can include: trade counseling, market research, vetting of potential partners, outreach to wholesale buyers, and support with international sales calls/trade shows/visits. To search for a domestic trade specialist near you, visit www.export.gov.

U.S. Embassy-Tokyo

Tamami Honda

Senior Commercial Specialist

Tamami.Honda@trade.gov

