



USA

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Brand USA

# Market Information

JAPAN

2019

## 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).*

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# Brand USA



## Who We Are

### Our Mission

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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

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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 in close partnership with more than 900 partner 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 six years Brand USA's marketing initiatives have helped welcome nearly 7 million incremental visitors to the USA, benefiting the U.S. economy with \$47.7 billion in total economic impact and supporting nearly 52,000 incremental jobs each year.**

## Learn More

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

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## A Message from Christopher L. Thompson



The team at Brand USA, the public-private partnership established to promote international tourism to the USA, looks forward to working with you to generate business in Japan's outbound-travel sector.

This guide will familiarize you with the factors that make the dynamic Japanese marketplace and its vibrant culture so appealing.

Japanese travelers make up the fourth-largest group of international visitors who come to the United States. (Only Canada, Mexico, and the U.K. provided more inbound international travelers.) During 2017, nearly 3.6 million Japanese visited the United States and spent \$16.6 billion, making them number four among the top international spenders.

Recent research among Japanese travelers showed that 79 percent of those surveyed plan to make a trip to the USA in the next five years. And, 44 percent would recommend the USA as a travel destination, while 33 percent would offer positive comments about the USA as a destination.

Brand USA launched a comprehensive storytelling strategy to create relevant, engaging, and authentic content, which presents the diversity of travel possibilities across the United States. This approach provides Japanese travelers the unique opportunity to see the unique aspects of the United States and further encourages them to visit the USA.

Our initiatives include:

- Showcasing destinations through our expanded travel-entertainment TV channel, GoUSA TV, which is available around the globe on Roku, Apple TV, and Amazon Fire TV, and coming soon to Google Chromecast. The channel offers an assortment of travel experiences across four different categories: the great outdoors, road trips, food and drink, and culture and events. Programming on GoUSA TV will expand to feature additional themes and formats, including series, films, videos, and live videos. This approach



aligns with the Japanese market, as there were 9.9 million subscription video-on-demand households, the greatest number in the Asia-Pacific region. That number is expected to double in the next few years.

- Last year we premiered our giant-screen film *America's Musical Journey*, which shares the unique styles of American music, our cultural heritage, and the stories associated with iconic locations across the USA. *National Park Adventure* is also available to viewers through video-on-demand streaming services.
- Our newest campaign, *United Stories*, features a mobile content creation lab traveling across the United States and capturing warm and welcoming stories told from local perspectives. A variety of accomplished content creators, storytellers, and influencers will bring international travelers on a journey through memorable narratives that reveal the warmth of the American people and show the many adventures across the USA that are just one road trip away.

I encourage you to talk to our team about destinations in the USA, the opportunities we offer to enhance your marketing efforts in Japan, and the most effective ways to inspire Japanese travelers to book their trips to the USA now.

Remember to review Brand USA's dedicated travel-trade website. This comprehensive gateway allows industry professionals to easily navigate information about U.S. travel.

Together, we are marketing the USA!

### **Christopher L. Thompson**

President & CEO  
Brand USA

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## Brand USA Executive & Senior Leadership

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# Market Facts



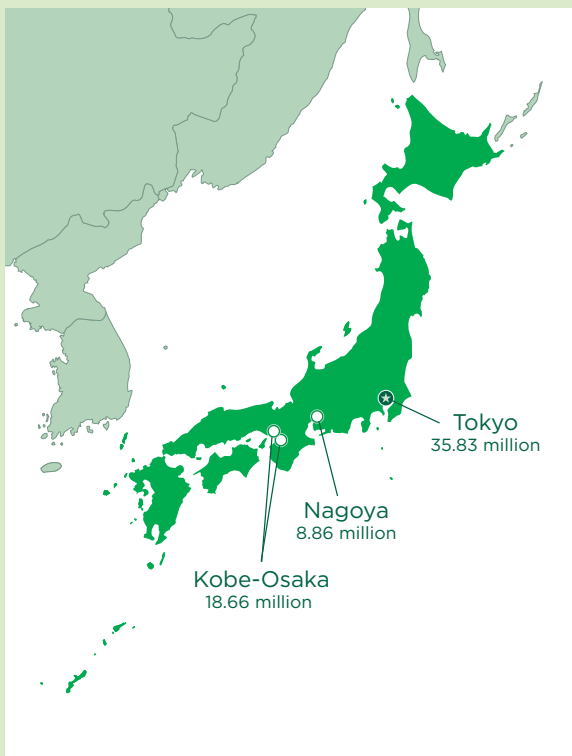
## Geography

### Area

377,915 km<sup>2</sup>  
(slightly smaller  
than California)

World rank: 62

### Largest Metropolitan Areas



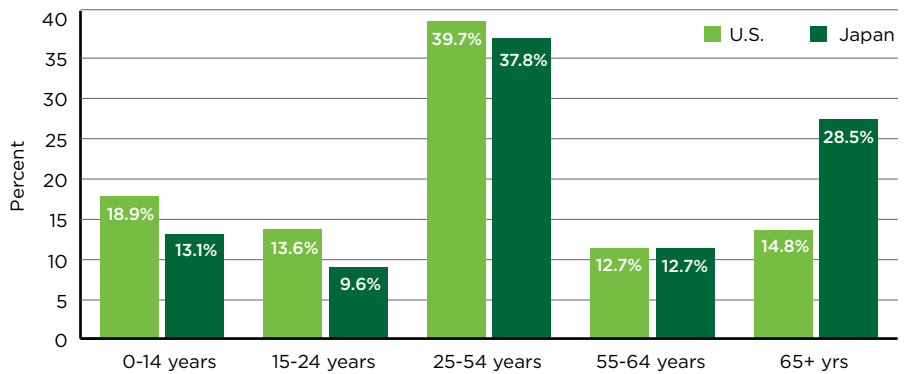
*Photos: Kobe (left); Fujiyoshida (right)*  
*Source: CIA World Factbook 2018*

# Demographics

## Population

	Japan	USA
Population size	126,829,000	323,730,000
World rank	10	3
Median age	46.5 years	37.8 years
Population growth rate (2015 est.)	-0.16%	0.78%

## Population by Age



# Economy

- **GDP:** US\$4.729 trillion (world's 4th largest)
- **GDP real growth rate:** 0.4% (January–December 2015)
- **GDP—per capita:** US\$37,595 (world's 28th highest)
- **Unemployment rate:** 3.2%
- **Inflation rate:** -0.1%

Source: CIA World Factbook 2018



## Vacation Allocation

Salaried Japanese employees typically have a maximum of 20 paid vacation days (depending on seniority), plus 17 public holidays. Japanese workers typically receive two bonuses per year, often equivalent to two months' salary each, but these are dependent on the performance of the company.

## Primary Travel Periods

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- **Golden Week:** April 29–May 7
- **Obon:** Mid-August
- **Silver Week:** September 15, 17, 22, and 24
- **New Year Holiday:** Approximately December 28–January 4
- **Emperor's Birthday:** December 23

## Public School Holidays

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- **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

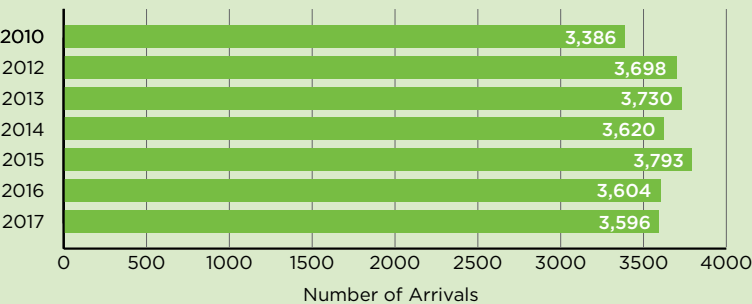


## International Travel Trends

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

	2010	2012	2013	2014	2015	2016	2017
<b>Total Travel &amp; Tourism Exports</b>	\$14,529	\$17,063	\$16,984	\$17,331	\$17,790	\$16,860	\$16,642
<b>Travel Receipts</b>	\$10,222	\$11,835	\$11,545	\$11,220	\$11,786	\$11,112	\$10,732
<b>Passenger Fare Receipts</b>	\$4,307	\$5,228	\$5,439	\$6,111	\$6,004	\$5,748	\$5,910
<b>Change (%) in Total Exports</b>	15	17	-0	2	3	-5	-1

### Visitation Trends: Arrivals



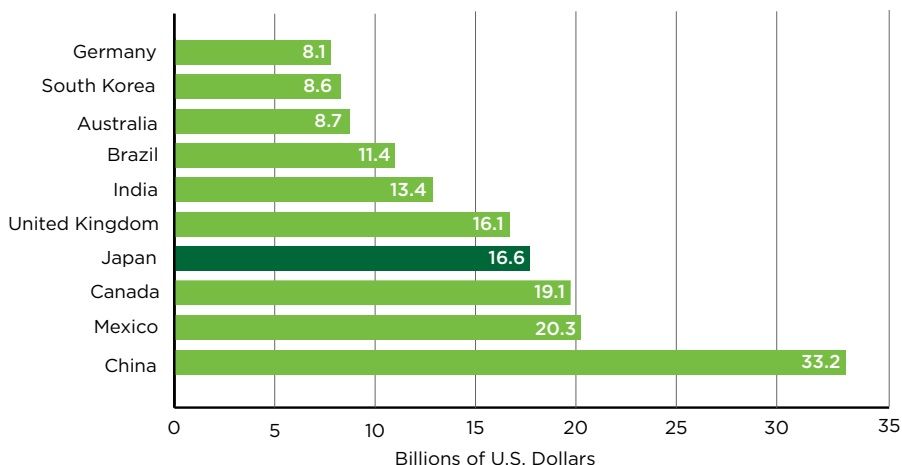
Photos: Tokyo (left), Gokayama (right)

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



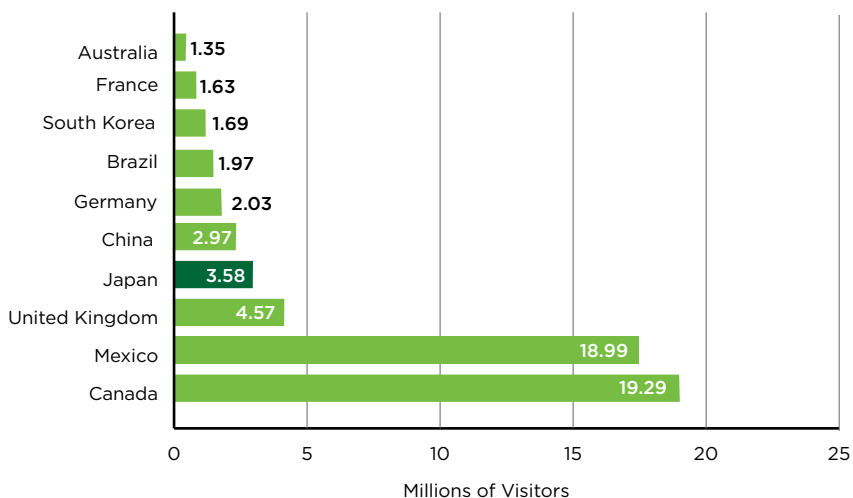
# Inbound Travel Trends

## 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	2016 (%)	2017 (%)
Vacation/Holiday	70.9	70.9
Business	12.0	12.4
Visit Friends/Relatives	7.7	8.4
Convention/Conference/Trade Show	6.2	5.7
Education	2.3	1.9
Health Treatment	0.1	0.2
Religion/Pilgrimages	0.5	0.1

## All Purposes of Trip

Main Purpose of Trip	2016 (%)	2017 (%)
Vacation/Holiday	75.5	75.8
Business	14.6	14.6
Visit Friends/Relatives	12.2	14.6
Convention/Conference/Trade Show	8.0	6.8
Education	3.3	3.3
Health Treatment	0.1	0.3
Religion/Pilgrimages	0.7	0.2
<b>NET PURPOSES OF TRIP</b>		
Leisure & Visit Friends and Relatives	81.3	82.3
Business & Convention	20.1	19.5

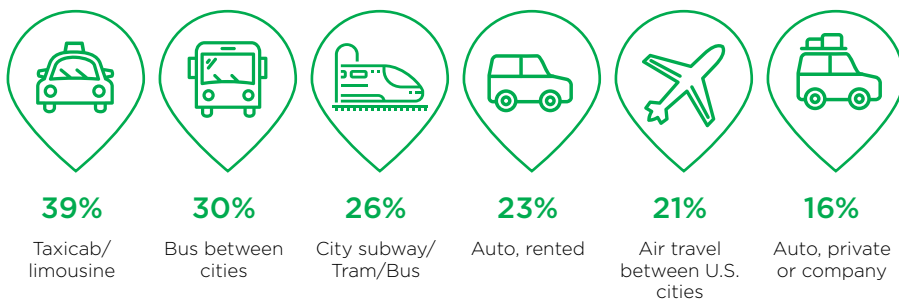
## Select Traveler Characteristics

Traveler Characteristics	2016	2017
Length of Stay in USA (Mean nights)	7.3	7.4
Length of Stay in USA (Median nights)	4	4
First International Trip to the USA (%)	24.3	22.9

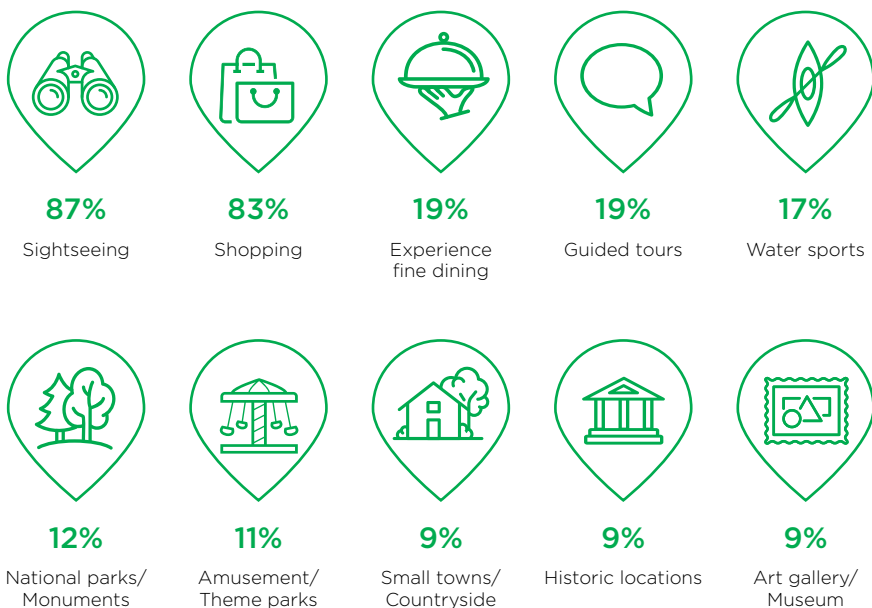
Source: U.S. Department of Commerce, National Travel and Tourism Office



## Transportation Used in the USA



## Activity Participation While in the USA



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

U.S. Destinations/Regions	2016 (%)	2017 (%)
<b>REGIONS</b>		
Pacific Islands	16.14	16.25
Pacific	63.98	63.12
New England	2.24	1.90
Middle Atlantic	9.17	8.69
South Atlantic	5.59	5.66
East North Central	4.54	4.00
West South Central	1.41	1.78
Mountain	4.46	4.58
<b>STATES/TERRITORIES</b>		
Illinois	2.27	1.84
New Jersey	0.80	n/a
New York	8.26	7.81
Arizona	1.51	1.32
Nevada	3.09	2.96
Massachusetts	1.91	1.69
California	15.12	14.65
Guam	20.86	17.56
Hawaii	43.21	45.39
Florida	2.72	2.23
Washington, D.C. (metro area)	1.86	1.85
<b>CITIES</b>		
Honolulu & Oahu	8.24	7.58
New York City	8.24	7.58
Anaheim-Santa Ana	2.40	2.33
Los Angeles	7.57	7.32
San Diego	1.64	1.47
San Francisco	4.31	4.27
Las Vegas	3.06	2.63
Boston	1.84	1.67
Chicago	2.17	1.69

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



# Air Travel Information



## Non-Stop Flights from Japan to the USA

Flights To	Flights From	Marketing Airline	Depart. Time	Arrival Time	Frequency (week)
Atlanta	Tokyo (Narita)	DL	16:30	16:00	7 (daily)
Boston	Tokyo (Narita)	JL	18:10	18:00	7 (daily)
Chicago	Tokyo (Haneda)	NH	10:50	08:40	7 (daily)
Chicago	Tokyo (Narita)	JL	10:50	08:35	7 (daily)
Chicago	Tokyo (Narita)	NH	17:05	14:55	7 (daily)
Chicago	Tokyo (Narita)	UA	17:45	15:45	7 (daily)
Chicago	Tokyo (Narita)	AA	17:55	15:55	7 (daily)
Dallas Fort Worth	Tokyo (Narita)	AA	10:30	08:20	7 (daily)
Dallas Fort Worth	Tokyo (Narita)	AA	17:25	15:15	7 (daily)
Dallas Fort Worth	Tokyo (Narita)	JL	11:10	08:50	7 (daily)
Denver	Tokyo (Narita)	UA	17:15	12:35	7 (daily)
Detroit	Tokyo (Narita)	DL	15:40	14:20	7 (daily)
Detroit	Nagoya	DL	16:30	16:06	5
Los Angeles	Tokyo (Haneda)	DL	15:15	08:56	7 (daily)
Los Angeles	Tokyo (Haneda)	AA	16:25	10:50	7 (daily)
Los Angeles	Tokyo (Haneda)	NH	22:55	16:55	7 (daily)
Los Angeles	Tokyo (Narita)	NH	16:00	09:50	7 (daily)
Los Angeles	Tokyo (Narita)	NH	17:00	10:50	7 (daily)
Los Angeles	Tokyo (Narita)	JL	17:25	11:15	7 (daily)
Los Angeles	Tokyo (Narita)	UA	17:10	11:10	7 (daily)
Los Angeles	Tokyo (Narita)	AA	18:05	12:25	7 (daily)

Photos: Kyoto (left); Tokyo (right)

Source: Brand USA Proprietary Research

Flights To	Flights From	Marketing Airline	Depart. Time	Arrival Time	Frequency (week)
Los Angeles	Tokyo (Narita)	SQ	19:15	13:25	7 (daily)
Los Angeles	Osaka	JL	17:25	11:45	7 (daily)
Minneapolis	Tokyo (Haneda)	DL	15:55	13:05	7 (daily)
New York (EWR)	Tokyo (Narita)	UA	17:00	15:45	7 (daily)
New York (JFK)	Tokyo (Haneda)	NH	10:20	10:15	7 (daily)
New York (JFK)	Tokyo (Haneda)	JL	10:40	10:35	7 (daily)
New York (JFK)	Tokyo (Narita)	NH	16:50	16:35	7 (daily)
New York (JFK)	Tokyo (Narita)	JL	18:25	18:20	7 (daily)
Portland	Tokyo (Narita)	DL	16:20	09:21	5
San Diego	Tokyo (Narita)	JL	17:05	09:45	7 (daily)
San Francisco	Tokyo (Haneda)	UA	16:50	09:45	7 (daily)
San Francisco	Tokyo (Haneda)	JL	19:50	13:10	7 (daily)
San Francisco	Tokyo (Narita)	NH	17:00	09:15	7 (daily)
San Francisco	Tokyo (Narita)	UA	17:55	10:10	7 (daily)
San Francisco	Osaka	UA	16:50	10:40	7 (daily)
San Jose	Tokyo (Narita)	NH	17:30	09:45	7 (daily)
Seattle	Tokyo (Narita)	DL	17:25	09:45	7 (daily)
Seattle	Tokyo (Narita)	NH	18:15	10:20	7 (daily)
Houston	Tokyo(Narita)	NH	10:50	09:45	7 (daily)
Houston	Tokyo(Narita)	UA	17:00	13:45	7 (daily)
Washington DC	Tokyo (Narita)	NH	10:40	09:15	7 (daily)
Washington DC	Tokyo (Narita)	UA	16:55	15:20	7 (daily)
Guam	Fukuoka	UA	11:50	16:40	7 (daily)
Guam	Tokyo (Narita)	JL	10:40	15:20	7 (daily)
Guam	Tokyo (Narita)	UA	11:00	15:40	7 (daily)
Guam	Tokyo (Narita)	UA	17:25	22:00	7 (daily)
Guam	Tokyo (Narita)	UA	21:20	01:55	7 (daily)
Guam	Nagoya	UA	11:30	16:30	7 (daily)
Guam	Nagoya	UA	20:50	01:25 +1	7 (daily)
Guam	Osaka	UA	11:05	15:50	7 (daily)
Guam	Osaka	UA	20:45	01:20 +1	7 (daily)



Flights To	Flights From	Marketing Airline	Depart. Time	Arrival Time	Frequency (week)
Guam	Osaka	TW	10:40	15:10	7 (daily)
Saipan	Tokyo (Narita)	DL	16:30	19:15	7 (daily)
Honolulu	Fukuoka	DL	18:55	07:52	5
Honolulu	Sapporo	HA	20:00	08:15	3
Honolulu	Tokyo (Haneda)	HA	21:30	09:45	7 (daily)
Honolulu	Tokyo (Haneda)	HA	23:55	12:05	4
Honolulu	Tokyo (Haneda)	NH	22:00	10:20	7 (daily)
Honolulu	Tokyo (Narita)	NH	20:20	08:40	7 (daily)
Honolulu	Tokyo (Narita)	NH	21:35	09:55	7 (daily)
Honolulu	Tokyo (Narita)	JL	20:00	08:40	7 (daily)
Honolulu	Tokyo (Narita)	JL	20:40	09:10	7 (daily)
Honolulu	Tokyo (Narita)	JL	21:15	09:55	7 (daily)
Honolulu	Tokyo (Narita)	JL	22:00	10:30	7 (daily)
Honolulu	Tokyo (Narita)	UA	19:00	06:50	7 (daily)
Honolulu	Tokyo (Narita)	DL	20:00	07:27	7 (daily)
Honolulu	Tokyo (Narita)	DL	21:00	08:53	7 (daily)
Honolulu	Tokyo (Narita)	HA	19:00	06:50	7 (daily)
Honolulu	Tokyo (Narita)	KE	21:00	08:35	7 (daily)
Honolulu	Nagoya	DL	21:35	10:14	7 (daily)
Honolulu	Nagoya	JL	22:05	10:55	7 (daily)
Honolulu	Osaka	JL	22:15	11:20	7 (daily)
Honolulu	Osaka	HA	21:20	09:55	7 (daily)
Honolulu	Osaka	DL	20:05	08:55	7 (daily)
Honolulu	Osaka	D7	23:25	12:30	4
Honolulu	Osaka	TR	19:50	09:00	4
Kona	Tokyo (Narita)	JL	21:25	-	7 (daily)
Kona	Tokyo (Haneda)	HA	23:55	-	3

# Market Snapshot



## Sales Distribution

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Japan has a highly regulated travel distribution system, with three levels of travel agencies. The major operators in the Japan travel market are involved in all levels of the distribution system.

- **Type 1 agencies** provide package, wholesale, and retail services for international and domestic travel products. They generally have a wholesale division, a media sales division, a group tour sales division, and a retail division.
- **Type 2 agencies** take the international travel products produced by type 1 agents and sell them directly to consumers. Type 2 agencies do not produce their own overseas travel products, but can produce and sell domestic tours.
- **Type 3 agencies** sell international and domestic packages produced by the type 1 and type 2 agencies. They do not have wholesale or packaging departments.

## Revenue of the Top 50 Japanese Travel Companies

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- The combined revenue of Japan's top-50 travel companies increased 3.2 percent—totaling 6.63 trillion, or \$62.52 billion—over a 12-month period ending in March 2016, compared to the previous 12 months.
- Strong growth continued in the inbound and domestic sectors, though outbound-travel revenue dropped 8.4 percent, to 2.02 trillion, or \$19.05 billion.

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



Type of Travel	Revenue (US\$) (Apr 2015–Mar 2016)	Revenue (US\$) (Apr 2014–Mar 2015)	Y-o-Y Change
<b>Outbound</b>	US\$19.05bn	US\$18.10bn	- 8.4%
<b>Inbound</b>	US\$1.64bn	US\$910m	+44.0%
<b>Domestic</b>	US\$41.86bn	US\$33.05bn	+8.3%
<b>Total</b>	<b>US\$62.52bn</b>	<b>US\$52.06bn</b>	<b>+3.2%</b>

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

## Distribution Trends

- Major companies control all levels of Japan's travel distribution system. Though distribution channels have become more fragmented, this marketing integration remains a key feature of the Japanese travel trade.
- In addition to serving the two major brochure seasons—Kamiki (April to September) and Shimoki (October to March)—wholesalers are packaging tours on-demand to take advantage of last-minute trends and peak- or low-traffic travel periods.
- The number of online-only businesses in Japan is increasing, and major wholesalers are expanding their online services and advertising.
- Japanese travel agents are rapidly shifting their attention from group tours to FIT travel, as Japanese consumers become more experienced travelers.
- FIT travelers made up a record 57.2 percent of all outbound travelers in 2015. Also, with 62.2 percent of all travelers now booking online, Japanese travel agents are moving their resources from brick-and-mortar sales to sales through their websites.
- During the first half of 2016, an estimated 49.1 percent of all travel bookings (online and off-line) were made through Japan's traditional travel agencies. Some 16.6 percent were made through airline websites, and close to 12 percent went through online travel agencies.

**Large wholesalers are increasing their focus on retail consultants to meet consumer demand for Free and Independent (FIT) travel.**

- Still, traditional stores remain important as places where consumers can consult with travel professionals. This is especially true for young, less-experienced consumers who seek advice regarding destinations, travel activities, and products that provide the best value.
- Most travel bookings—arranged online or in stores—go through Japan’s traditional travel agencies. Consequently, it is vital for destinations, hotels, and attractions to be included in the portfolios of these agents.

## Key Travel Trade Events in 2019

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- KIX Travel Fair, May 18-19
- JATA Tourism Expo, Intex Osaka, Oct. 24-27

## Booking Tendencies

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The Japanese typically make bookings one to six months in advance. Travel to long-haul destinations is often booked earlier than average. The numbers shown below are an average.



**4.8 months  
before departure**

First think about  
making a trip



**3.6 months  
before departure**

Start to consider  
trip options



**2.9 months  
before departure**

Start booking  
application process

## Japanese Styles of Travel

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In 2017, 28.4 percent of Japanese traveled overseas with their partner, down from 29.3 percent in 2016. Traveling alone is the second most common form of travel for the fourth year in a row. Families travelling with children is up 0.3 percent year-over-year. The majority of Japanese prefer to travel in small groups of one to three people.

*Source: AB Road Research Center*



Style of Travel	2016 (%)	2017 (%)
Married Couple	29.3	28.4
Single Traveler	16.4	15.4
Family with Children	14.0	14.3
With a Friend (2 people)	12.0	11.4
With Friends (3 people or more)	9.8	10.3
Travel with Parents	6.5	6.5
Couple Travel	4.3	5.0
3-Generation Family Travel	3.0	3.4
Other	4.6	5.3

## Japanese Travelers

Taiwan overtakes Hawaii (Oahu) as the overall top destination for Japanese travelers in 2016. South Korea and Guam remain firm favorites at third and fourth place respectively, as well as other Asian destinations including Thailand.

2016	2015	Top Destinations for Japanese Travelers	(%)	% Change
1st	1st	Taiwan	17.5	-1.3
2nd	2nd	Hawaii (Oahu)	13.6	0.9
3rd	3rd	South Korea	11.2	-0.9
4th	5th	Hong Kong	7.1	-0.1
5th	6th	Thailand (other than beach resorts)	5.9	0.1
<b>6th</b>	<b>9th</b>	<b>USA West Coast</b>	<b>5.4</b>	<b>0.2</b>
7th	7th	Singapore	5.3	-0.3
=	8th	Italy	5.3	-0.1
=	9th	Western Europe	5.0	-0.5
8th	-	France	4.8	-0.1
9th	-	Australia	4.7	0.6
10th	-	USA East Coast	4.4	-0.3

Source: AB Road Research Center

## What Influences Japanese Travelers' Travel Making Decisions?

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

- 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 (especially following the 2011 Tohoku earthquake)

## Japanese Travelers' Destination Satisfaction

All regions of the USA feature in the top 10 destinations of satisfaction in 2016. U.S. The West Coast increased 13 places year-over-year and Hawaii (Oahu) has climbed four places at third place. They are closely followed by the U.S. South in fifth and Hawaii (except Oahu) and the U.S. East Coast. The rise in ranking for each U.S. destination could be due to slight decrease in satisfaction ratings for many destinations (for example, Canada) compared to 2015.

Satisfaction Rankings			Destinations	% of Japanese satisfied with trip
2016	2015	2014		
1st	5th	3rd	Western Europe (e.g. France, Spain, Italy, Germany)	97.7
<b>2nd</b>	<b>15th</b>	<b>12th</b>	<b>USA West</b>	<b>95.8</b>
3rd	7th	10th	Hawaii (Oahu)	95.5
=	6th	10th	Germany	95.5
4th	-	-	Italy	95.3
5th	10th	-	USA South	94.9
6th	-	-	Other places Europe	94.8
7th	7th	10th	Hawaii (except Oahu)	93.5
8th	8th	-	Central/South America	93.4
9th	11th	4th	U.S. East Coast	93.0
10th	2nd	7th	Canada	92.6

Source: AB Road Research Center





## Technology and Media Consumption

Distinctive characteristics of Japanese mass media consumption (2016)

### Television Usage

Television is still the main source of news and entertainment for the Japanese. The average person watches 2 hours and 55 minutes of television per day, and this figure greatly increases among older generations.

### Media Consumption in Japan, Average Time Spent Per Day



**2.5  
hours**

Television



**20.4  
minutes**

Newspapers



**13.8  
minutes**

Magazines



**3.5  
hours**

Websites



**0.3  
hours**

Social Media

### Comparison with other Markets

	Television	Newspapers	Magazines	Websites	Social Media
<b>USA</b>	3.3 hours	25.0 minutes	17.6 minutes	6.2 hours	1.7 hours
<b>China</b>	1.23 hours	12.0 minutes	1.0 minute	5.6 hours	1.5 hours
<b>Germany</b>	2.55 hours	-	-	4.6 hours	1.1 hours

### Smartphone Usage

Smartphone use increased 19 percent year-over-year to 48.32 million in 2015. Ownership rate is 64.0 percent among those aged 30-39 and 50.1 percent among those aged 40-49.

### Internet Usage

Approximately 100.6 million Japanese are internet users—79.1 percent of the population. They use the internet for an average of 3.5 hours per

Source: AB Road Research Center

day—greatly increased compared to 20 years ago, but still less than other technologically advanced nations. However, Japanese ages 20–29 now spend more time per day on the internet than they spend watching television.

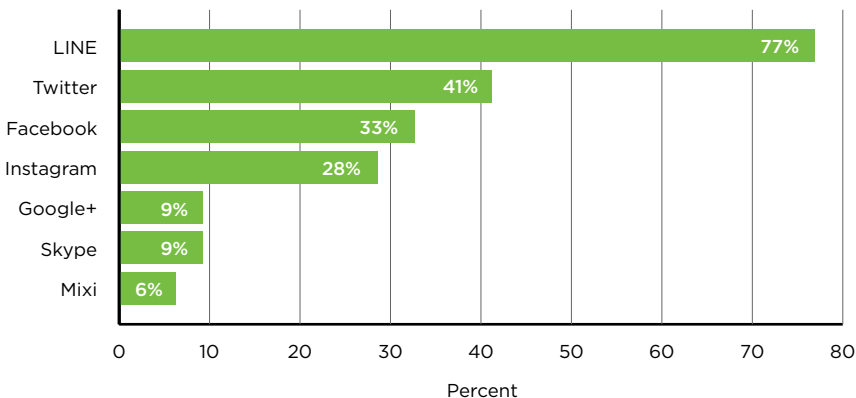
### Internet Travel Searches

An estimated 72 percent of Japanese outbound travelers refer to information on the internet before making reservations. 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. Worldwide leaders Facebook, Twitter, and YouTube also dominate market share, but Japanese users continue to embrace home-grown platforms such as long-running social network and gaming platform Mixi and video-sharing website Niconico. While the majority of middle-aged Japanese are now familiar with Facebook and Twitter, image-sharing applications such as Instagram and Tumblr are just beginning to take off with younger generations.

### Japanese Social Media Users

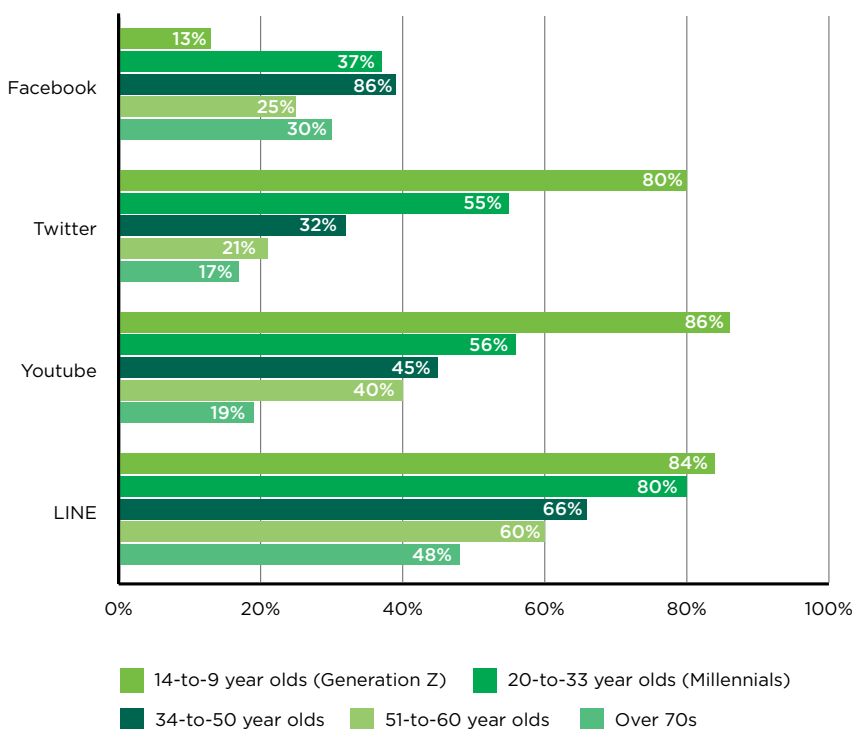




## Social Media Usage

The average amount of time that the Japanese spend using online social media per day is 15.5 minutes, compared with an average of 26.0 minutes browsing web pages, but this rate varies greatly by generation. While Japanese ages 10–29 spending an average of 46.6 minutes on online social media, Japanese ages 30–59 spend an average of just 7.5 minutes.

## Social Media Use by Age



- **LINE:** A smartphone application social messaging network that has an estimated 52 million users in Japan, making it Japan's most popular social messaging network. It is used by an estimated 82 percent of all Japanese female SNS users and 66 percent of all Japanese male SNS users. LINE is arguably the most powerful B2C SNS, and both Japanese and overseas

corporations are creating official accounts to communicate directly with consumers and offer them stamps and special offers. Among overseas DMOs, Tourism Malaysia, Tourism Authority of Thailand, and the Taiwanese Tourism Bureau have official LINE accounts.

- **Facebook:** Estimated to have 35.4 million users in Japan, 26.0 million of who are monthly active users. Accessing Facebook via a smartphone is particularly popular in Japan, with 86 percent of Japanese Facebook users doing so, compared to a global average of 71 percent. 95 percent of Japanese access Facebook through mobile devices, and 84 percent of Facebook posts are made on mobile devices.
- **Twitter:** Estimated to have 40 million users in Japan at the end of 2016—a growth of 35 million users from 5.2 million in 2011. It is distinctly more popular among younger demographics than other SNS, with 56.7 percent of males and 62 percent of females aged 10-19 using it. Japanese is the second most tweeted language in the world after English.
- **Instagram:** Estimated to have 10 million monthly active users (Dec. 2016), Instagram has experienced the fastest growth rate among SNS in Japan in the past few years, with 2.6 times more users in December 2014 than in January 2013.

## 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	42.7
Travel Agency pamphlets	20.1
Travel Agency counters	8.6
Information magazines sent from travel agents and airlines	8.4
Internet accessed by smartphone/tablet, etc.	7.0
Travel with Parents	6.5

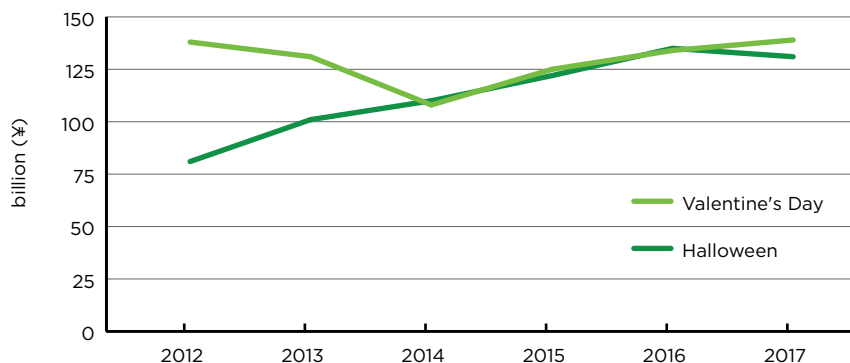
Source: AB Road Research Center



## 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 ¥135 billion (\$1.2 billion), even surpassing Valentine's Day (¥134 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

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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

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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

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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
- **Twitter:** @VisitTheUSA
- **Facebook:** Facebook.com/VisitTheUSA
- **YouTube:** YouTube.com/VisitTheUSA
- **Instagram:** VisitTheUSA

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

- **Global:** #VisitTheUSA
- **Great Outdoors:** #OutdoorsUSA
- **Flavors/Culinary:** #TasteUSA
- **Market the Welcome:** #USAWelcome
- **Road Trips:** #RoadTripUSA

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	 @VisitOsUSA  @VisitTheUSA	 facebook.com/VisitTheUSAau  YouTube.com/VisitTheUSA	#VisitTheUSA
Brazil	VisiteosUSA.com.br	Planeje Sua Viagem Aos USA Agora Mesmo	 @VisitOsUSA  @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	frVisitTheUSA.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><b>Sina Weibo</b> (Chinese microblogging site/hybrid of Twitter and Facebook): <a href="http://weibo.com/GoUSAcn">http://weibo.com/GoUSAcn</a></p> <p><b>Tencent Weibo</b> (Chinese microblogging site): <a href="http://t.qq.com/DiscoverGoUSA">http://t.qq.com/DiscoverGoUSA</a></p> <p><b>Youku</b> (YouTube equivalent): <a href="http://youku.com/gousacn">http://youku.com/gousacn</a></p> <p><b>Weishi</b> (like Vine): <a href="http://www.weishi.com/u/23484775">http://www.weishi.com/u/23484775</a></p> <p><b>Wechat</b> (Chinese mobile social network for texting, images, music and articles sharing, mobile only): <a href="#">美国国家旅游局</a></p> <p><b>Lofter</b> (Photo sharing platform): <a href="http://GoUSA.lofter.com">http://GoUSA.lofter.com</a></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
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





## 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=1010).*

*Base: Japan Intercontinental travelers.*



**62%**

Dining/  
gastronomy



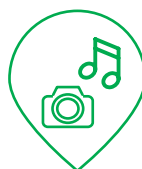
**56%**

Cultural/historic  
attractions



**41%**

Shopping



**33%**

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=1024). Base: Japan Intercontinental travelers.*

**49%**

Diverse

**46%**

Energetic

**34%**

Friendly

**25%**

Optimistic

**22%**

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=1024).



62%

Websites  
via computer



38%

Information in  
printed travel  
guidebooks



31%

Websites/  
applications  
via tablet



28%

Personal advice  
from travel  
professionals/  
travel agents

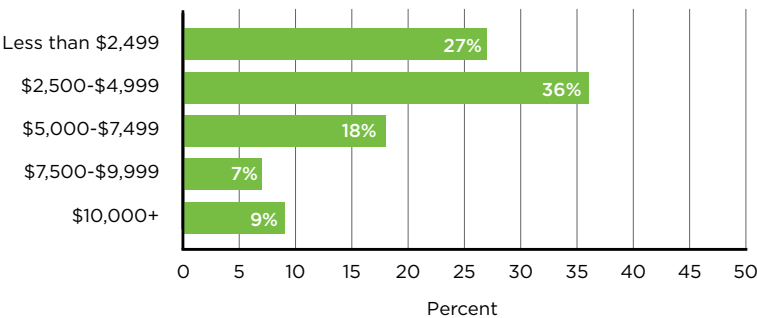


28%

Websites/  
applications  
via mobile phone

# 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=1024). Note: Totals may not add up to 100% due to rounding (Conversion JPY to USD= 0.009).



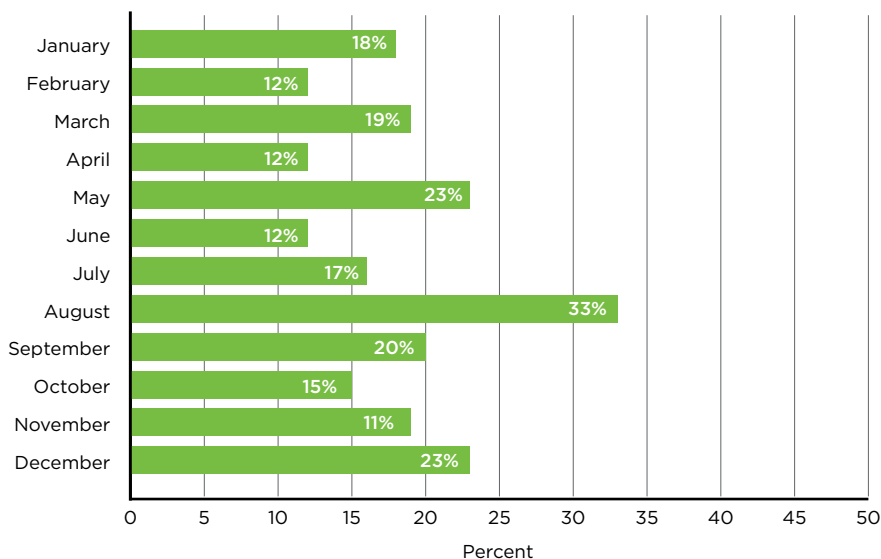
**Mean:** \$5,113 **Median:** \$3,640

Source: Brand USA Market Intelligence Study 2018



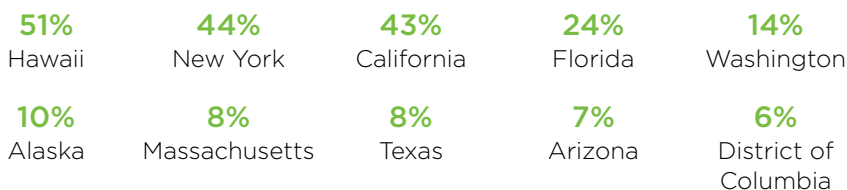
## Months Traveled (March 2016–March 2018)

Question: During what month(s) did you take your holiday(s)? Base: Japan Intercontinental travelers 2017 (N=1024).



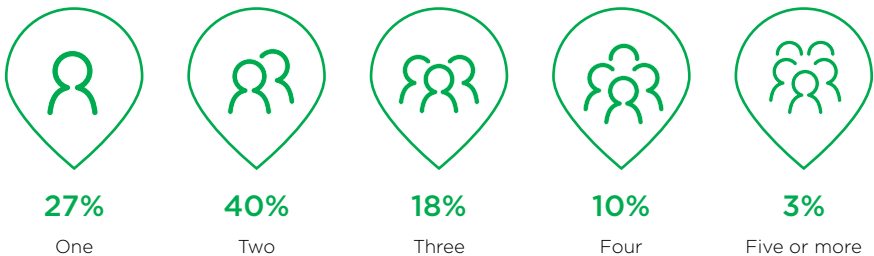
## Destination Interest—Top 10 States

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=973).



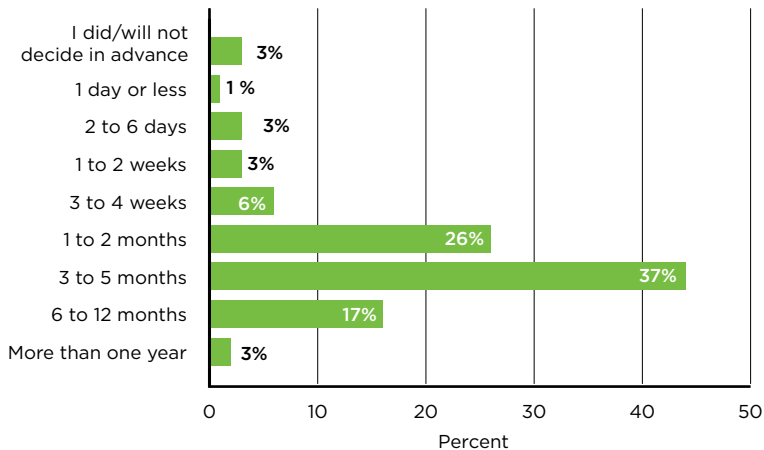
# Expected Travel Party Size of Next Intercontinental Trip

Question: Who will travel with you on this holiday? Select all that apply. Base: Japan Intercontinental travelers 2017 (N=1024). Note: Totals may not add up to 100% due to rounding.



# Destination Decision for Next International Trip

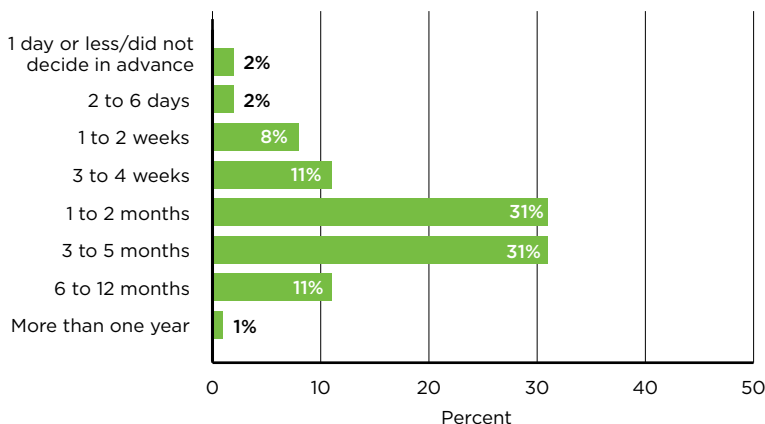
Question: How far in advance of your departure date did/will you decide on the destination? Base: Japan Intercontinental travelers 2017 (N=1024). Note: Totals may not add up to 100% due to rounding.





## 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 2017 (N=1024). 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=1024). Note: Totals may not add up to 100% due to rounding.



44%

I would bring it up to recommend as a destination



33%

I would tell people positive things about it if it were brought up



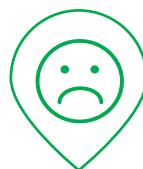
16%

I would tell people neither positive nor negative things if it were brought up



4%

I would tell people negative things if it were brought up

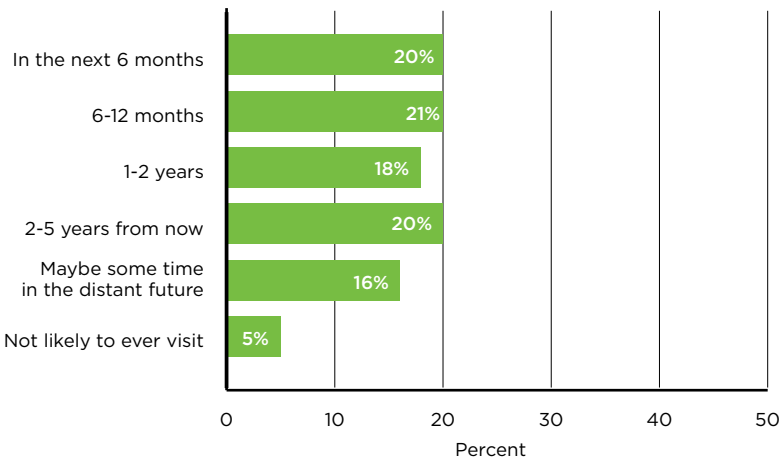


1%

I would bring it up to discourage people from traveling there

# Likelihood of Travel to the USA

Question: When, if ever, are you likely to visit the following countries? Base: Japan Intercontinental travelers 2017 (N=1024).





## Highlights of Success

Brand USA is building on success. With the support of its many partners worldwide, Brand USA has grown from a start-up organization (that launched its first full year in operation in 2012 with just 89 partners) to an organization that has worked with and been supported by over 900 partners worldwide.

Here is some of what we've accomplished together so far:

- Welcomed nearly 7 million incremental international visitors to the USA over the past six years, which has benefited the U.S. economy with \$47.7 billion in total economic impact and supported, on average, nearly 52,000 incremental jobs a year (source: Oxford Economics).
- Increased the number of international travelers coming to the United States to, through, and beyond the gateways.
- Established consumer and trade marketing initiatives in more than 40 international markets, which generate 90 percent of all inbound travel to the United States.
- Created the first connected TV channel by a national destination marketing organization.
- Delivered trailblazing content that resonates with travelers worldwide and can be enjoyed on virtually any platform—from mobile to the giant screen and everything in between.
- Produced two award-winning giant-screen films that are inspiring hundreds of millions of travelers to come to the USA.
- Organized the industry's first MegaFam—which has brought hundreds of top-tier travel buyers to the USA.
- Pioneered a range of cooperative marketing programs and platforms that are enabling U.S. destinations of all shapes and sizes to connect with international travelers like never before.
- Established partnerships with destinations and travel brands from all 50 states, the five territories, and the District of Columbia.
- Maintained a partnership retention rate of over 90 percent.

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

**900+**  
partners  
(with a 94%  
retention rate)

**6.6 million**  
incremental visitors



**\$21.8 billion**  
incremental spending



**\$6.2 billion**  
federal, state &  
local taxes



**\$47.7 billion**  
total economic  
impact



nearly  
**52,000**  
incremental jobs  
supported each year







- Built a model public-private partnership—working with all tourism-related federal agencies to promote and leverage the economic and social benefit of travel and extend a warm welcome to international travelers throughout the world.
- Supported our federal partners in accurately communicating information about U.S. entry policies and, importantly, correcting misperceptions about those policies.
- Kept overhead expenses to below 10 percent each year since our founding—devoting more than 90 percent of Brand USA's resources toward marketing and programs to increase international visitation.

By all these measures and more, Brand USA's marketing efforts are working—effectively and efficiently.

## 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, including:

- Albania
- Angola
- Argentina
- Australia
- Austria
- Belgium
- Brazil
- Canada
- Chile
- China
- Colombia
- Costa Rica
- Denmark
- Ecuador
- El Salvador
- Equatorial Guinea
- Finland
- France
- Gabon
- Germany
- Guatemala
- Guyana
- Honduras
- Hong Kong
- Hungary
- India
- Indonesia
- Ireland
- Italy
- Japan
- Kenya
- Kuwait
- Lithuania
- Luxembourg
- Mexico
- Morocco
- Mozambique
- Nepal
- Netherlands
- New Zealand
- Norway
- Oman
- Panama
- Paraguay
- Peru
- Philippines
- Portugal
- Romania
- Saudi Arabia
- South Africa
- Tanzania
- Ukraine
- United Arab Emirates
- Uruguay
- Vietnam
- Zambia
- Zimbabwe

# Brand USA Partnerships



## Visit USA Committee, Japan

### How Brand USA Works with Visit USA Committees

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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*

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## 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)

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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  
[ntto@trade.gov](mailto:ntto@trade.gov)

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#### Claudia Wolfe

Economist  
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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](http://www.export.gov).

## U.S. Embassy-Tokyo

### **Tamami Honda**

Senior Commercial Specialist

*Tamami.Honda@trade.gov*



**TheBrandUSA.com**

06.03.19