

Global Market Profile

JAPAN



October 2024

Introduction

- Tourism Economics forecasts that domestic leisure visitation will account for \$101B in spending in California in 2024 and international visitation will account for \$28B.
- The **Global Market Profile** reports were developed by Visit California Research to provide the organization and the state's tourism industry with insights on California's domestic market and thirteen opportunity international markets through detailed market landscapes as well as highly targeted audience profiles and traveler behavior insights.

Market Landscape:



Audience Insights:



California Traveler & Trip Details:

- **Market Landscape** includes foundational intelligence from Visit California:
 - Visitation and Spending Forecasts
 - Airlift Recovery (flights and seats)
 - Arrival Numbers & California Market Share
 - Consumer travel intent and barriers
- **Audience Insights** includes a profile of target travelers, including:
 - Description and size of Audience Target
 - Demographic profile
 - General travel planning behavior
 - General trip spending
 - Advertising and sports preferences
- **California Traveler & Trip Details** includes details about visitors to California from the past year, including:
 - Trip purpose
 - First/Repeat visitation
 - Destinations visited
 - Travel party, accommodations, activities and expenditures

Methodology & Sources

- The report contains three sections:
 - The **Market Landscape** section is sourced from Visit California's key research partners, including Tourism Economics, NTTO, CIC Research, Cirium and YouGov.
 - The **Audience Insights** section is sourced from YouGov's Global Travel Profiles which tracks travel-related sentiment and behavior in over 25 global markets, including all thirteen Visit California opportunity markets. Panelists are surveyed on preferred trip types, booking methods, accommodation preferences, and advertising perceptions.
 - The audience profile is built on a segmentation of consumers planning international leisure travel in the next 12 months and are considering California as a destination.* The profiles provide insights into those travelers most likely to visit the state.
 - The **California Traveler and Trip Characteristic** section provides information on trips that included a stay in California from the Survey of International Air Travelers (SIAT).



Market Landscape

Country Profile

Japan



POPULATION: *

123.8M

EXCHANGE RATE: **

Local currency to USD dollar

146.3

GROSS DOMESTIC PRODUCT (GDP):

Annual % chg ***

0.9%

INFLATION RATE:

Annual % chg ****

2.2%

* www.worldometers.info, 2024

** www.x-rates.com, Aug 2024

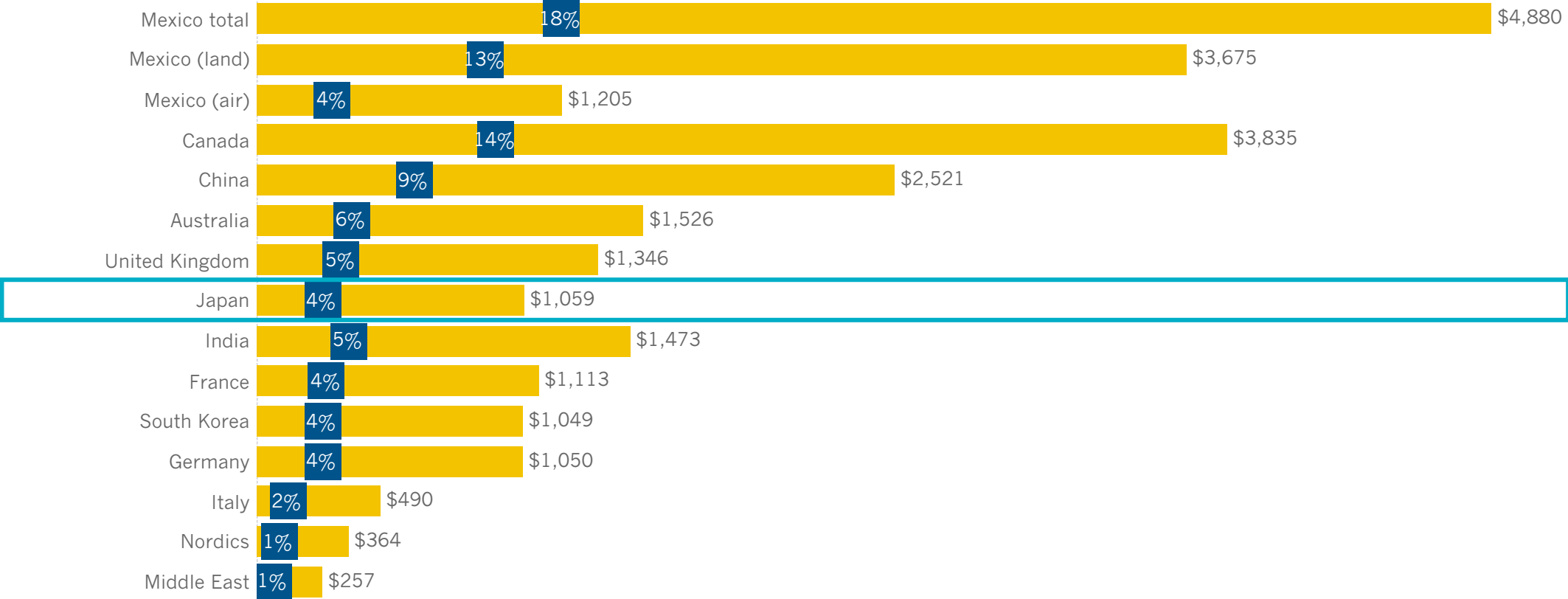
*** www.imf.org, 2024

**** www.imf.org, 2024

Forecast: Visitor Spending by Market (2024)

The chart below shows California's visitor spending forecast for the state's 13 target markets and share of total international spending in the state.

2024 Spend Forecast



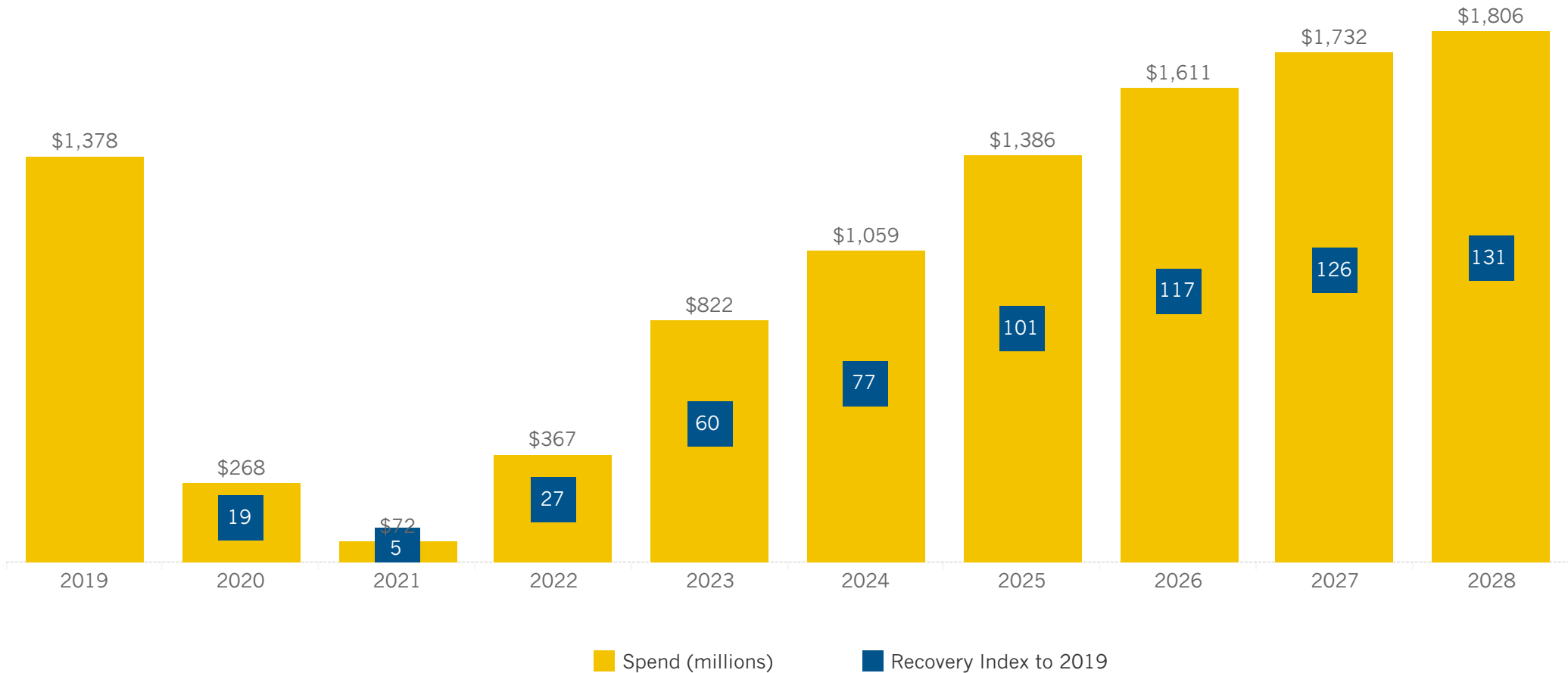
■ Spend (millions) ■ Share of Total Int'l Spend

Source: Tourism Economics (October 2024)

Forecast: Visitor Spending

The chart below shows the state's visitor spending forecast and the recovery index for the focus market.

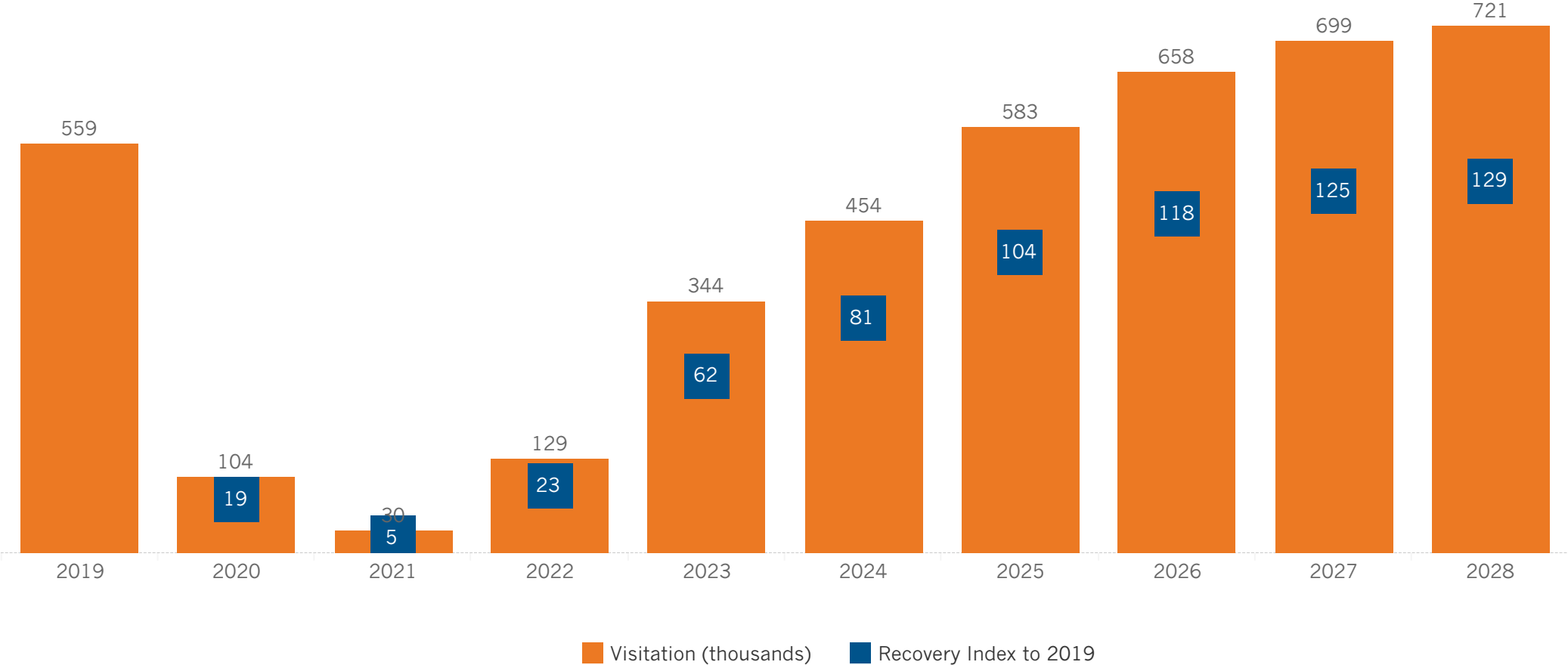
Japan: Spend Forecast with Recovery Index to 2019



Forecast: Visitor Volume

The chart below shows the state's visitation forecast and recovery index for the focus market.

Japan: Visitation Forecast with Recovery Index to 2019



Source: Tourism Economics (October 2024)

International Visitor Spending by Region

The table below shows the distribution of international visitor spending by California tourism region in total and for the focus market .

Region	Total International Visitor Spend (2023)		Japan Visitor Spend* (2023)		
	Spending (\$B)	%	Spending (\$B)	%	Index
Central Coast	\$0.828	3.7%	\$0.016	2.0%	54
Central Valley	\$0.278	1.2%	\$0.007	0.8%	65
Deserts	\$0.861	3.8%	\$0.005	0.7%	17
Gold Country	\$0.168	0.7%	\$0.005	0.6%	82
High Sierra	\$0.238	1.1%	\$0.001	0.2%	17
Inland Empire	\$0.308	1.4%	\$0.006	0.8%	56
Los Angeles	\$8.113	36.0%	\$0.314	38.1%	106
North Coast	\$0.037	0.2%	\$0.000	0.0%	16
Orange County	\$2.219	9.8%	\$0.109	13.3%	135
San Diego	\$3.062	13.6%	\$0.076	9.3%	68
San Francisco Bay Area	\$6.407	28.4%	\$0.281	34.2%	120
Shasta Cascade	\$0.030	0.1%	\$0.001	0.1%	51
Total California	\$22.549	100%	\$0.822	100%	

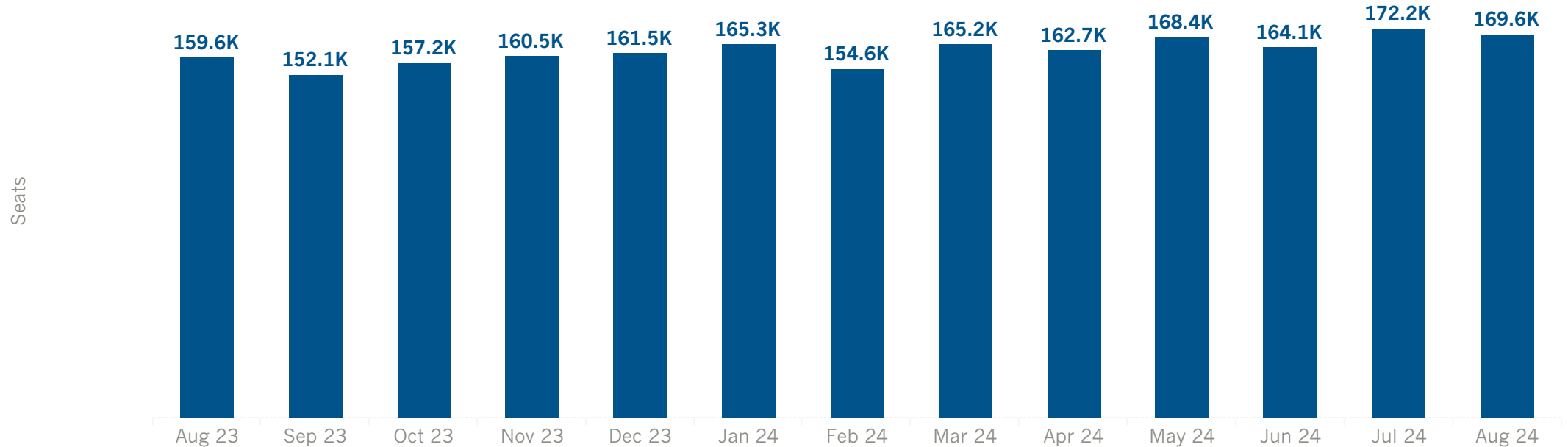
*Regional visitor spending for the focus market is estimated using a Visit California proprietary model that adjusts statewide visitor spending estimates for the focus market to the region-level using Visa Destination Insights credit card data. The index shown compares the regional share of spending from the focus market to the share of total international spending in the region.

Source: Tourism Economics/Visa Destination Insights/Visit California Research (June 2024)

Airlift to California

The charts below shows airlift to California for the focus market.

Japan: Non-Stop Seats

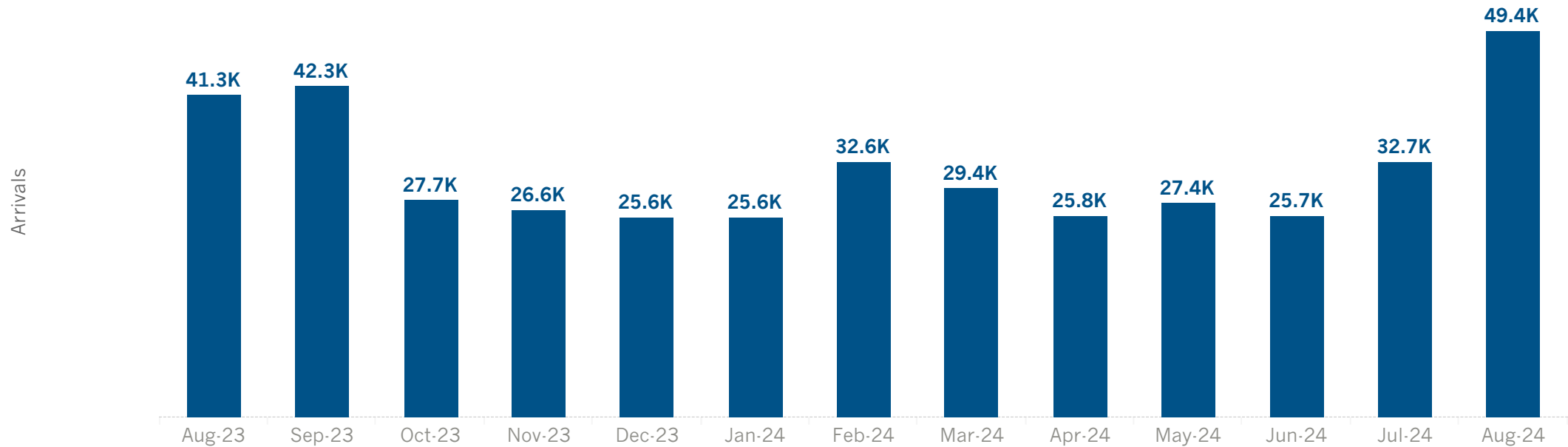


YoY % Chg	56%	55%	50%	37%	31%	24%	26%	20%	16%	12%	7%	8%	6%
% Chg vs 2019	18%	16%	17%	25%	21%	36%	34%	24%	25%	24%	25%	27%	25%

Non-Resident Arrivals to California

The chart below shows non-resident arrivals at California's ports of entry for the focus market.

Japan: Non-Resident Arrivals at Ports of Entry



YoY % chg	101%	135%	83%	83%	69%	47%	59%	21%	43%	36%	21%	20%	20%
% chg vs 2019	-31%	-18%	-37%	-32%	-43%	-27%	-35%	-42%	-44%	-21%	-29%	-23%	-18%

California's Int'l Market Share (Visits)

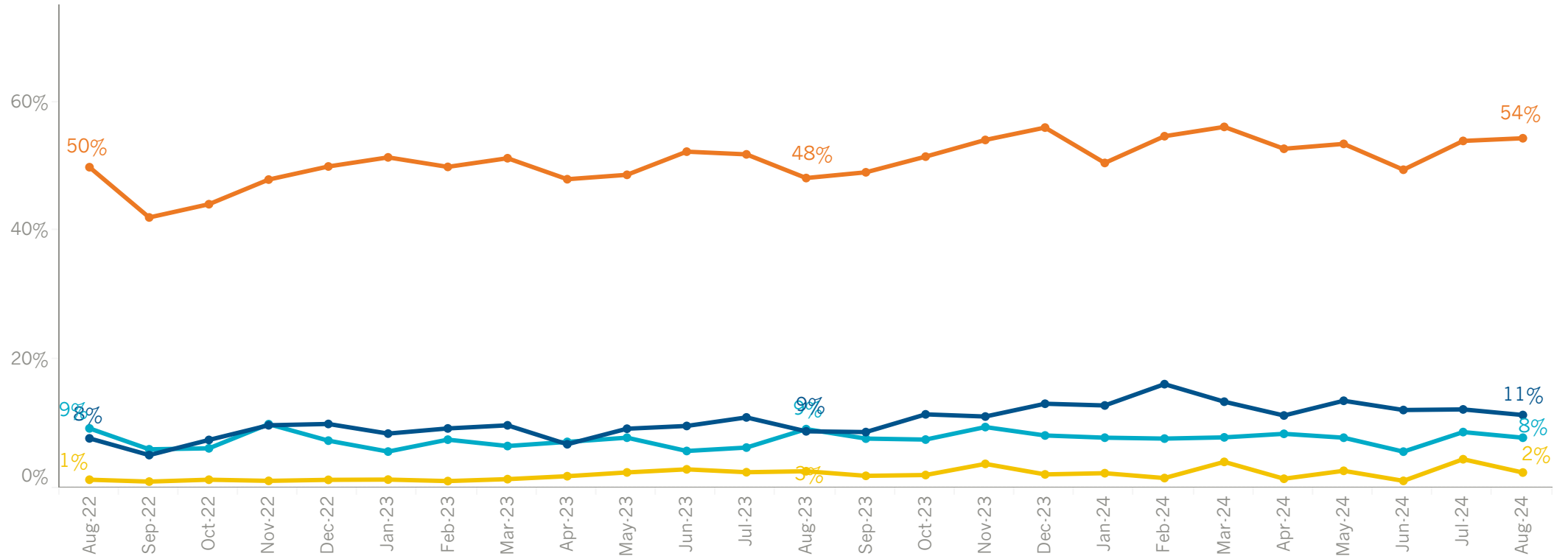
	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Total	22.2%	21.9%	22.6%	23.3%	22.7%	22.8%	22.0%	19.5%	23.3%	23.1%	22.5%
Mexico	51.3%	44.6%	42.4%	41.7%	43.0%	43.2%	41.9%	29.5%	35.8%	47.9%	48.0%
China	46.3%	46.1%	41.4%	42.9%	36.5%	38.1%	36.5%	38.9%	37.0%	41.8%	45.6%
Australia	48.2%	49.2%	49.4%	49.3%	46.2%	44.6%	45.3%	41.2%	40.0%	39.4%	43.1%
India	26.9%	25.1%	28.2%	25.8%	25.8%	30.0%	28.5%	26.8%	19.2%	25.7%	27.2%
France	27.7%	27.4%	26.6%	28.0%	26.0%	26.8%	24.8%	21.2%	22.5%	27.0%	25.9%
South Korea	29.2%	26.2%	24.8%	25.1%	23.9%	24.3%	21.1%	21.4%	27.1%	23.8%	24.5%
Germany	21.8%	22.5%	21.8%	22.1%	23.4%	23.8%	21.8%	20.1%	16.5%	23.7%	22.9%
Japan	13.6%	14.8%	15.7%	15.2%	14.7%	15.7%	14.9%	14.9%	24.7%	21.6%	22.7%
Italy	16.7%	18.7%	21.4%	22.0%	19.2%	21.8%	18.8%	14.2%	15.5%	20.6%	17.9%
Nordics	20.1%	19.6%	22.7%	20.7%	24.8%	22.9%	20.7%	23.8%	20.3%	26.4%	17.4%
United Kingdom	17.3%	15.7%	16.6%	17.4%	16.3%	17.4%	15.8%	16.6%	18.4%	17.0%	16.1%
Middle East	11.7%	13.7%	13.5%	15.5%	11.5%	11.3%	9.8%	4.8%	10.7%	10.2%	9.2%
Canada	6.7%	7.1%	7.6%	8.0%	8.1%	8.0%	8.4%	8.3%	12.3%	9.1%	8.6%
Brazil	8.7%	9.4%	9.1%	9.9%	10.8%	8.6%	9.2%	8.3%	7.9%	8.7%	8.0%

Travel Planned in Next 12 Months

The chart below shows the types of trips planned in the next 12 months for the focus market.

Japan: Planning to Travel in the Next 12 Months (% of pop age 16+)

- Domestic leisure
- Domestic business
- International leisure
- International business

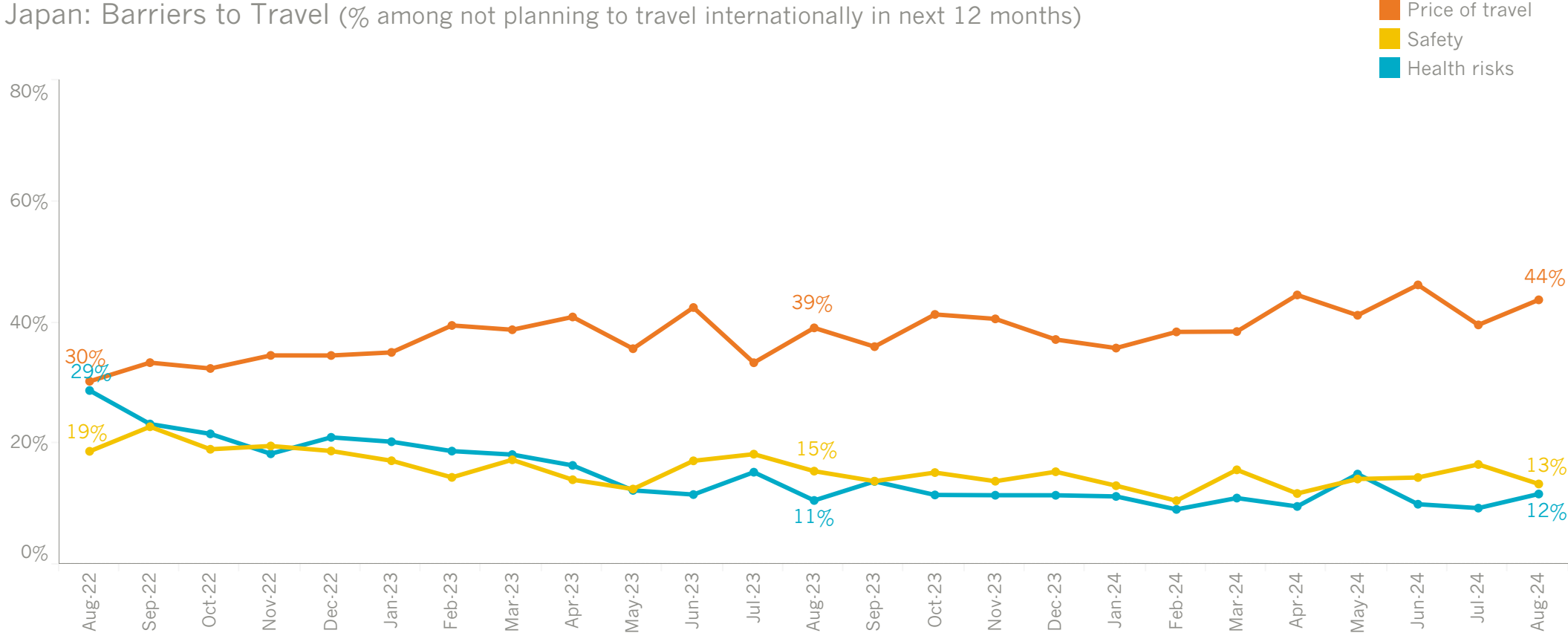


Q: Which, if any, of the following trips are you planning to take in the next 12 months?
Data reported through: August 2024

Barriers to Travel

The chart below shows perceived barriers to travel among consumers not currently planning an international trip in the focus market.

Japan: Barriers to Travel (% among not planning to travel internationally in next 12 months)



Q: Which, if any, of the below factors are currently preventing you from traveling?

Data reported through: August 2024

Source: YouGov



Audience Insights



Int'l leisure travelers
considering California
"CA Traveler Target"

Audience Profile

The chart shows the incidence of international leisure travelers in the focus market and the subset of international leisure travelers considering California as a destination.

The following audience profile is based on the survey responses over a 12-month period of those consumers considering California as a destination for international leisure travel.

Definitions:

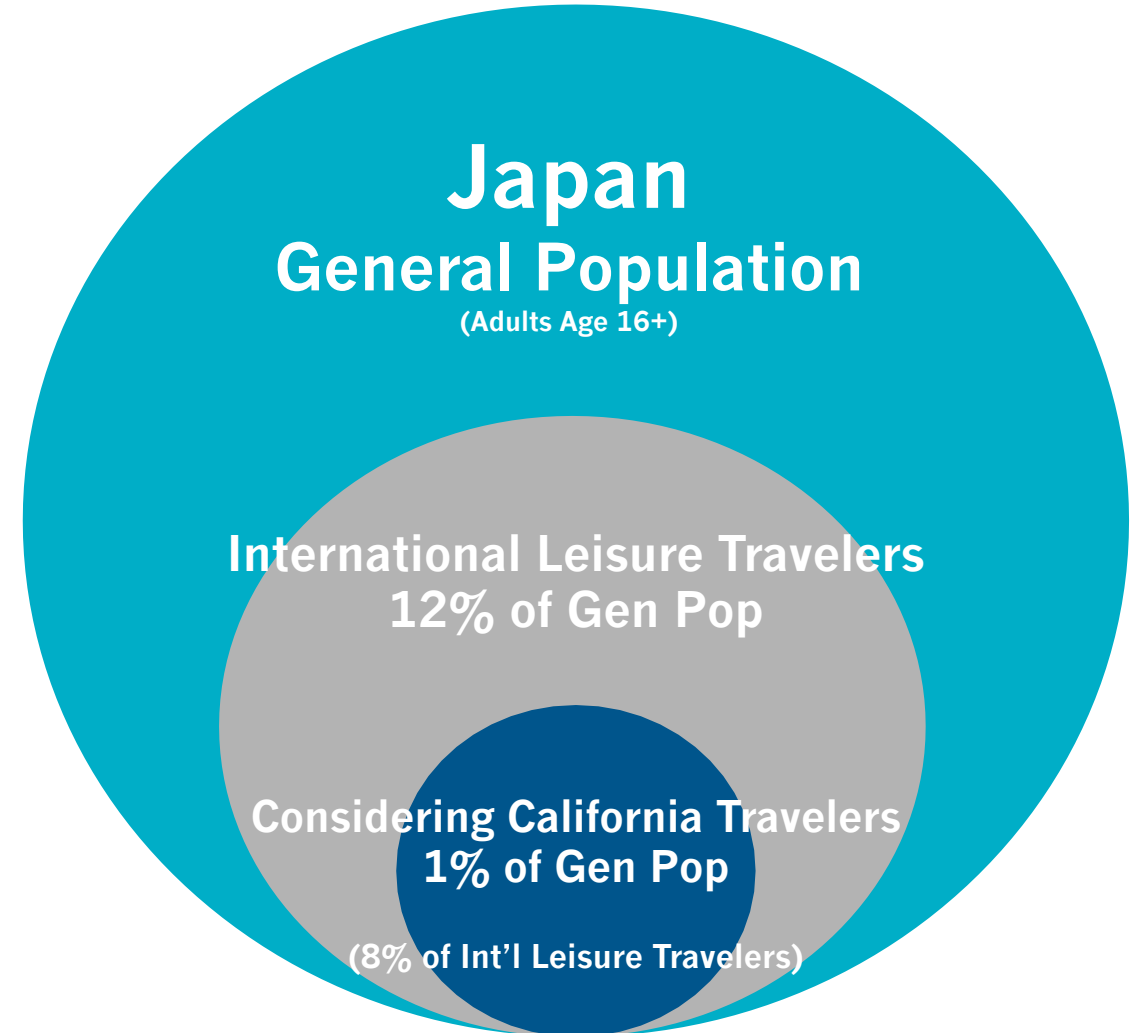
International Leisure Travelers:

Consumers in the focus market planning an international leisure trip in the next 12 months.

Considering California Travelers ("CA Traveler Target")*:

Among the consumers in the focus market planning international leisure travel, those who are considering California as destination for travel in the next 12 months.

*Note: Due to sample size limitations for the China and Japan markets, the YouGov profile reporting is supplemented with sample of travelers considering U.S. destinations for leisure travel in addition to travelers specifically considering California. The target size shown to the right, however, reflects travelers considering California.



How to Read the Data

Generation	CA Traveler Target	Index
Gen Z	5%	59
Millennial	51%	115
Gen X	29%	124
Baby Boomer	13%	60

Generation Definitions:

- Gen Z (2000 and later)
- Millennial (1982-1999)
- Gen X (1965-1981)
- Boomer (1946-1964)

Data:

- **CA Traveler Target:** Shows the incidence (%) of the demographic characteristic or travel activity among international leisure travelers considering California as a destination in the focus market.
- **Index:** Compares the incidence (%) of the CA Traveler Target to the incidence (%) of all International Leisure Travelers. For example, an index of 115 indicates that the measure among the CA Traveler Target is 1.15x greater than among International Leisure Travelers in the focus market.



Int'l leisure travelers
considering California
"CA Traveler Target"

Demographic Profile

The chart below shows the demographic profile of the consumer target in the focus market.

Japan

Gender		
	CA Traveler Target	Index
Female	46%	99
Male	54%	101

Marital Status		
	CA Traveler Target	Index
Married	57%	98
Single	25%	99

Family Status		
	CA Traveler Target	Index
Children <18	16%	125

Age		
	CA Traveler Target	Index
Age 16-24	5%	70
Age 25-34	18%	102
Age 35-44	23%	118
Age 45-54	15%	100
Age 55+	38%	95

Generation		
	CA Traveler Target	Index
Gen Z	4%	56
Millennial	33%	107
Gen X	33%	111
Baby Boomer	30%	92

Income*		
	CA Traveler Target	Index
Higher income	24%	108
Middle income	45%	96
Lower income	24%	109
Prefer not to say	8%	78

Region		
	CA Traveler Target	Index
Kantō	51%	111
Kansai	17%	102
Chūbu	15%	96
Tōhoku	5%	161
Chūgoku	5%	104
Kyūshū	3%	38
Hokkaidō	2%	62
Shikoku	2%	70

*Income definitions: Higher >200% of median, Middle 75% to 200% of median, Lower <75% of median



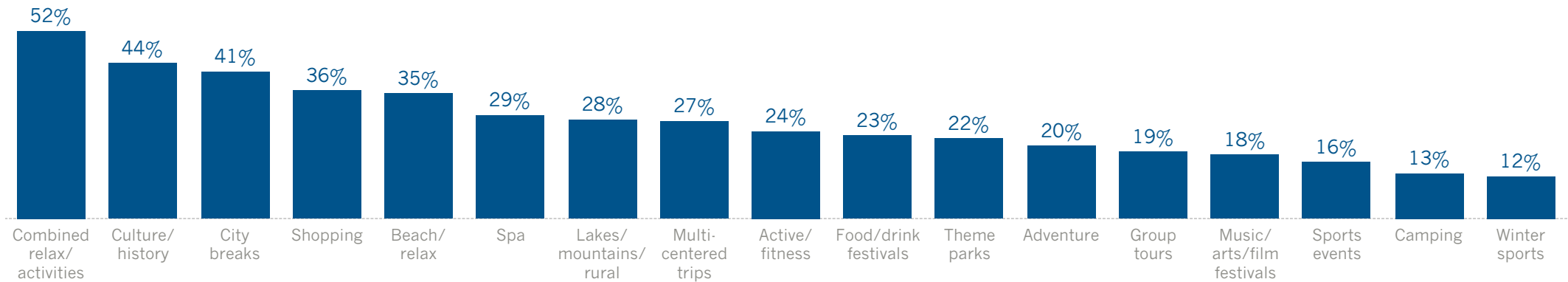
Int'l leisure travelers
considering California
"CA Traveler Target"

Trip Preferences/Characteristics

The chart below shows the typical trip preferences & characteristics of the consumer target in the focus market.

Japan

Trip Type



Traveler Type

	CA Traveler Target	Index
Budget	30%	92
Luxury	16%	136
Responsible	16%	106
All-inclusive	9%	101
Adventurous	6%	88

Travel Party (from most recent vacation)

	CA Traveler Target	Index
My partner	48%	91
My children	24%	103
Solo	23%	129
Friend(s)	19%	101
Other family	12%	85
Other person(s)	2%	152

Q Trip Type: Which of the following types of holidays do you typically take?

Q Traveler Type: Which of the following best describes the type of traveler you are?

Q Travel Party: Thinking about your most recent holiday, which of the following best describes the group or individual you went on holiday with?

Source: YouGov (July 2023 to June 2024)



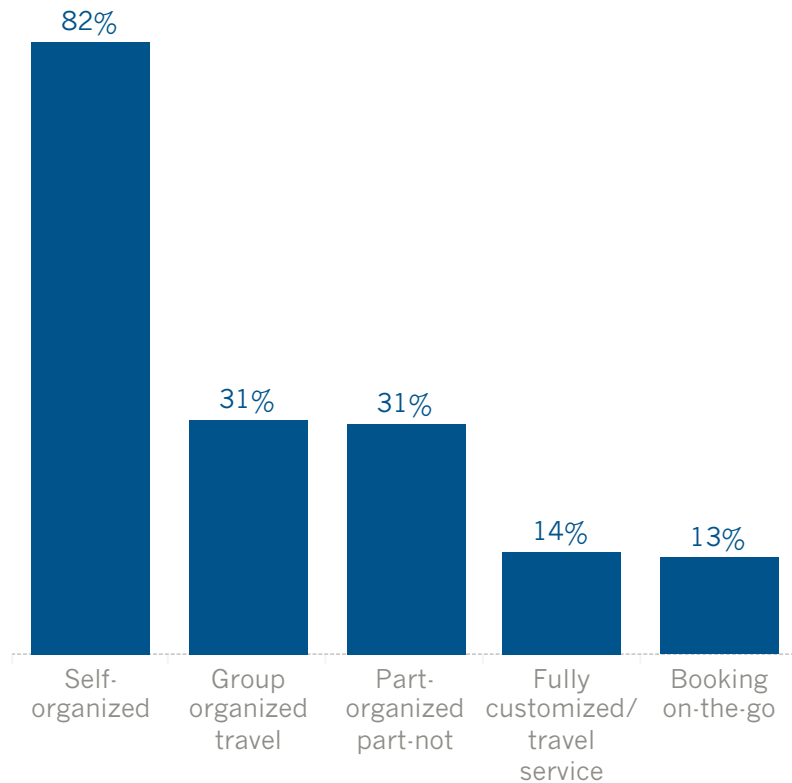
Int'l leisure travelers
considering California
"CA Traveler Target"

Organizing/Planning Methods

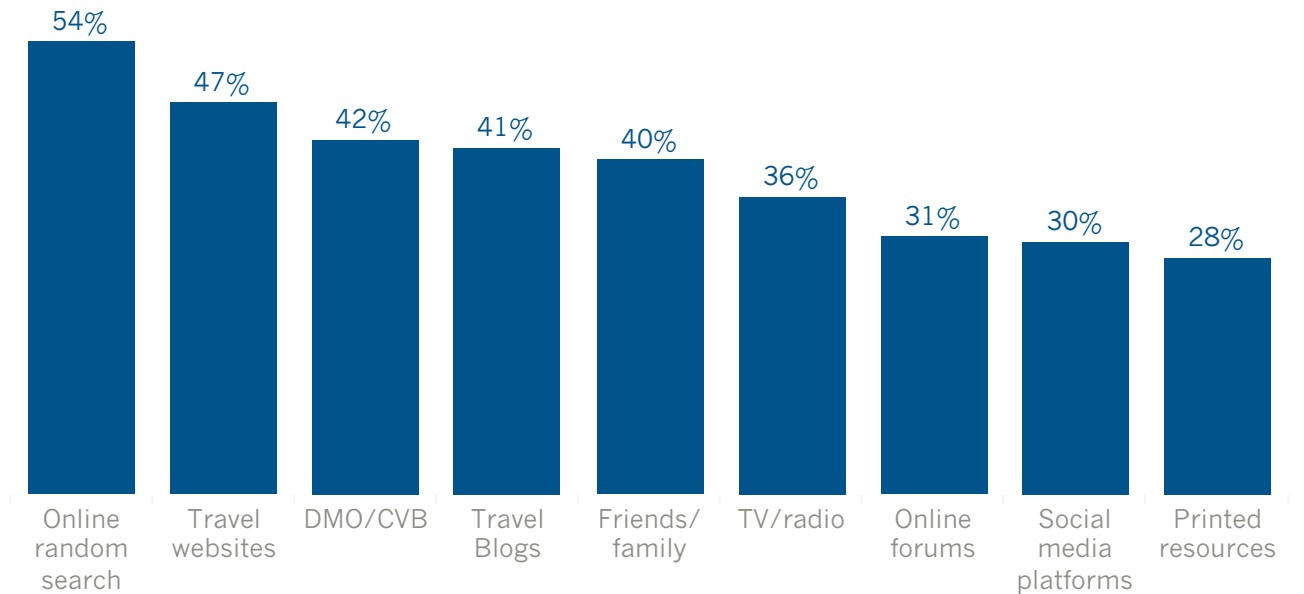
The chart below shows the organizing and planning methods of of the consumer target in the focus market.

Japan

Organizing Travel



Planning Methods



Q Organizing: Which of the following describe how you generally organize your holidays?

Q Planning: Which of the following methods do you generally use to help plan a holiday?

Source: YouGov (July 2023 to June 2024)

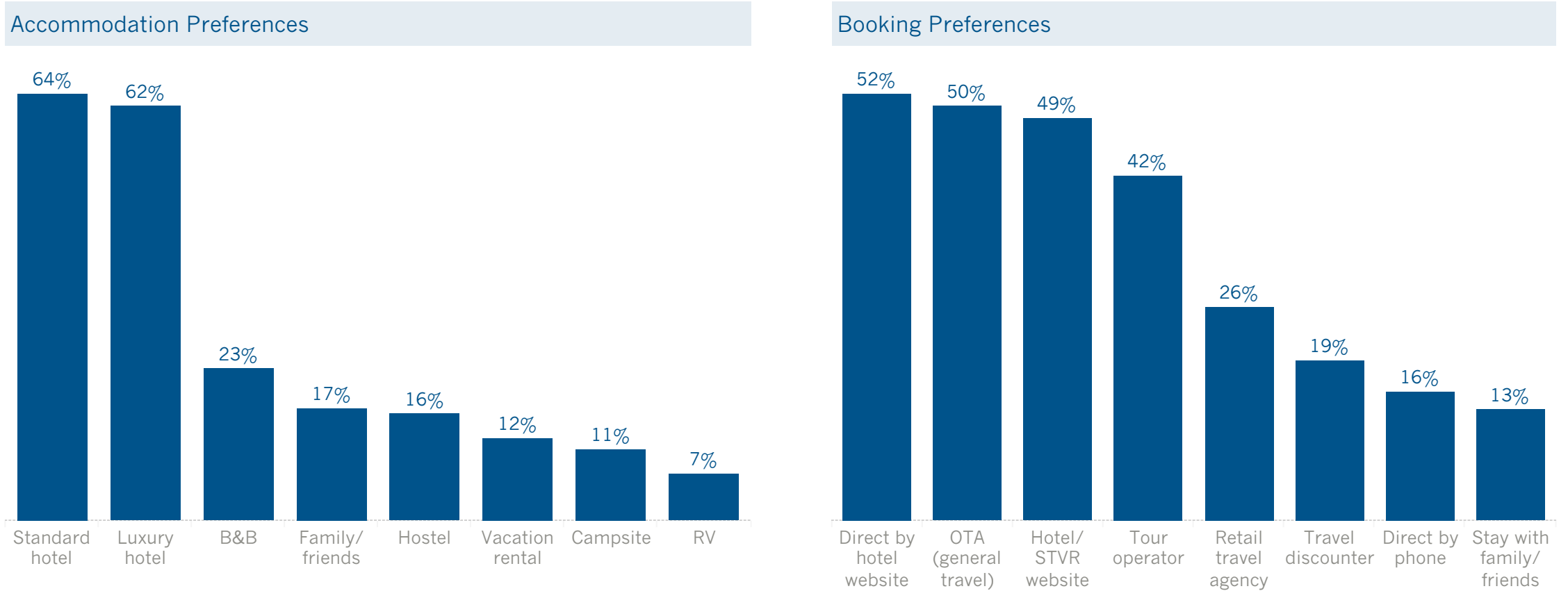


Int'l leisure travelers
considering California
"CA Traveler Target"

Booking Preferences

The chart below shows the accommodation preferences of of the consumer target in the focus market.

Japan



Q Accommodation: Which of the following types of accommodations do you typically stay in when you are on holiday?
Q Booking: Which of the following booking methods do you typically use when booking accommodations for the holidays?



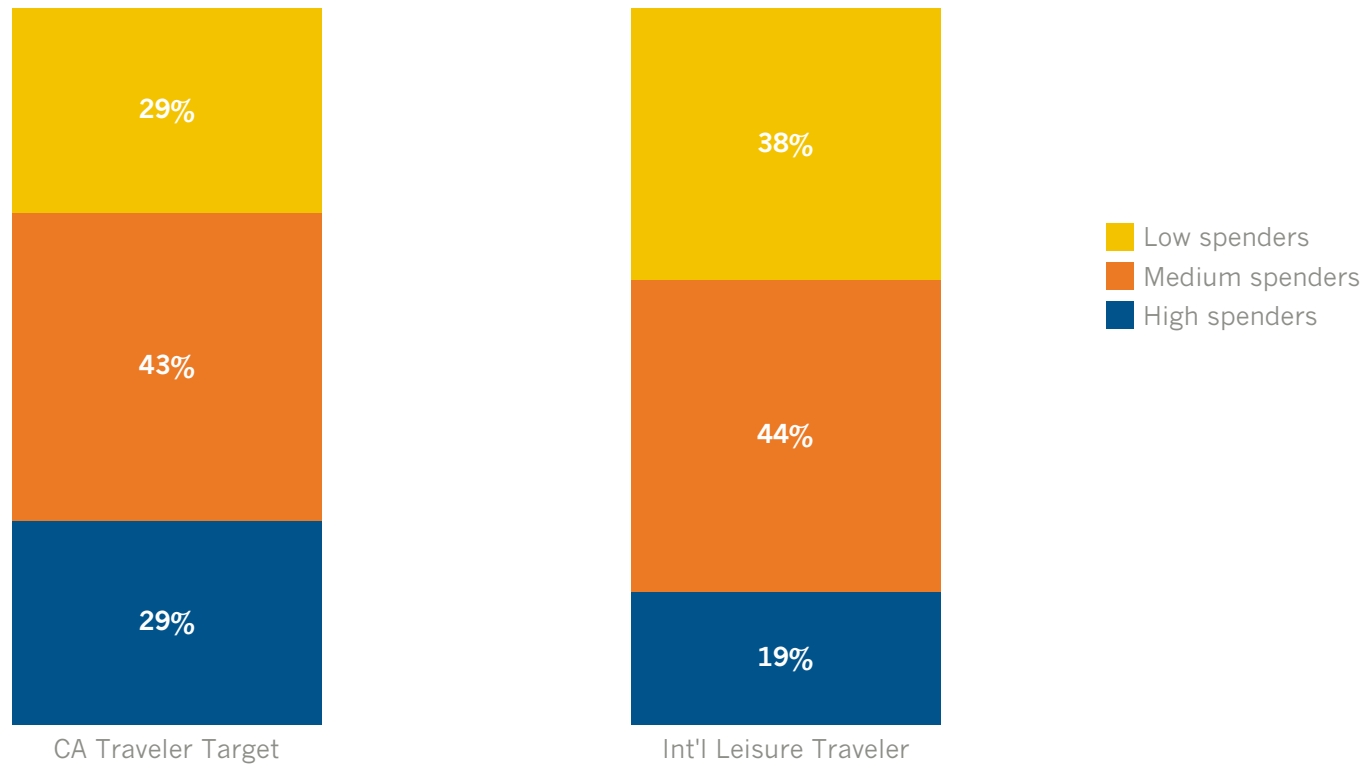
Int'l leisure travelers
considering California
"CA Traveler Target"

Travel Spending

The chart shows the travel spending of the consumer target in the focus market based on the most recent vacation.

Japan

Travel Spending (from most recent vacation)





Int'l leisure travelers
considering California
"CA Traveler Target"

Media & Advertising

The data shows advertising influences and sports preferences of the target consumer in the focus market.

Japan

Advertising Influences

	CA Traveler Target	Index
Travel websites	47%	106
TV - Free to view channels	38%	139
Social media	38%	122
Direct mail	38%	133
Billboards	36%	157
Online streaming services	29%	126
Magazines (digital)	28%	148
Cinema	28%	175
Local newspaper (digital)	26%	136
National newspaper (digital)	24%	136
National newspaper (physical)	23%	116
Local newspaper (physical)	22%	116
Magazines (physical)	21%	101
Public transport	18%	153
TV - paid/subscription	16%	191
Radio	12%	163
Podcast	8%	151

Sports Watched/Followed

	CA Traveler Target	Index
Baseball	47%	117
Soccer/Football	32%	127
Tennis	28%	144
Golf	24%	151
Swimming	22%	172
Boxing	19%	199
Volleyball	19%	183
Running/Marathon	18%	148
Athletics/Track & Field	18%	139
Basketball	17%	200
Rugby League	17%	157
Gymnastics	15%	191
NFL	11%	215
Horse Racing	10%	103
Surfing	10%	248
Cycling	10%	172
Ice Hockey	9%	193
Cricket	7%	288
Australian Rules Football	7%	196

Q Advertising: Thinking about your next travel or holiday related purchase,...where would you advertise to catch your attention?

Q Sports: Which of the following sports do you watch or follow?

Source: YouGov (July 2023 to June 2024)



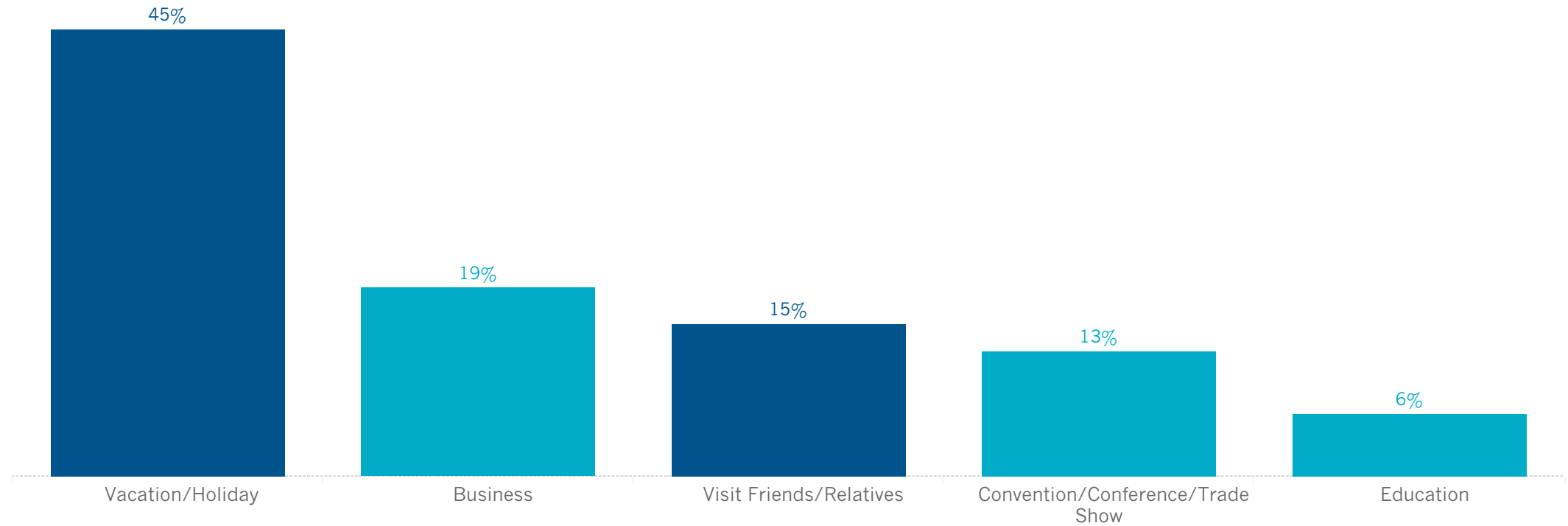
California Travelers & California Trip Characteristics

Main Purpose of Trip

The chart below shows the main purpose of the trip among travelers in the focus market.

Japan

Main Purpose of Trip

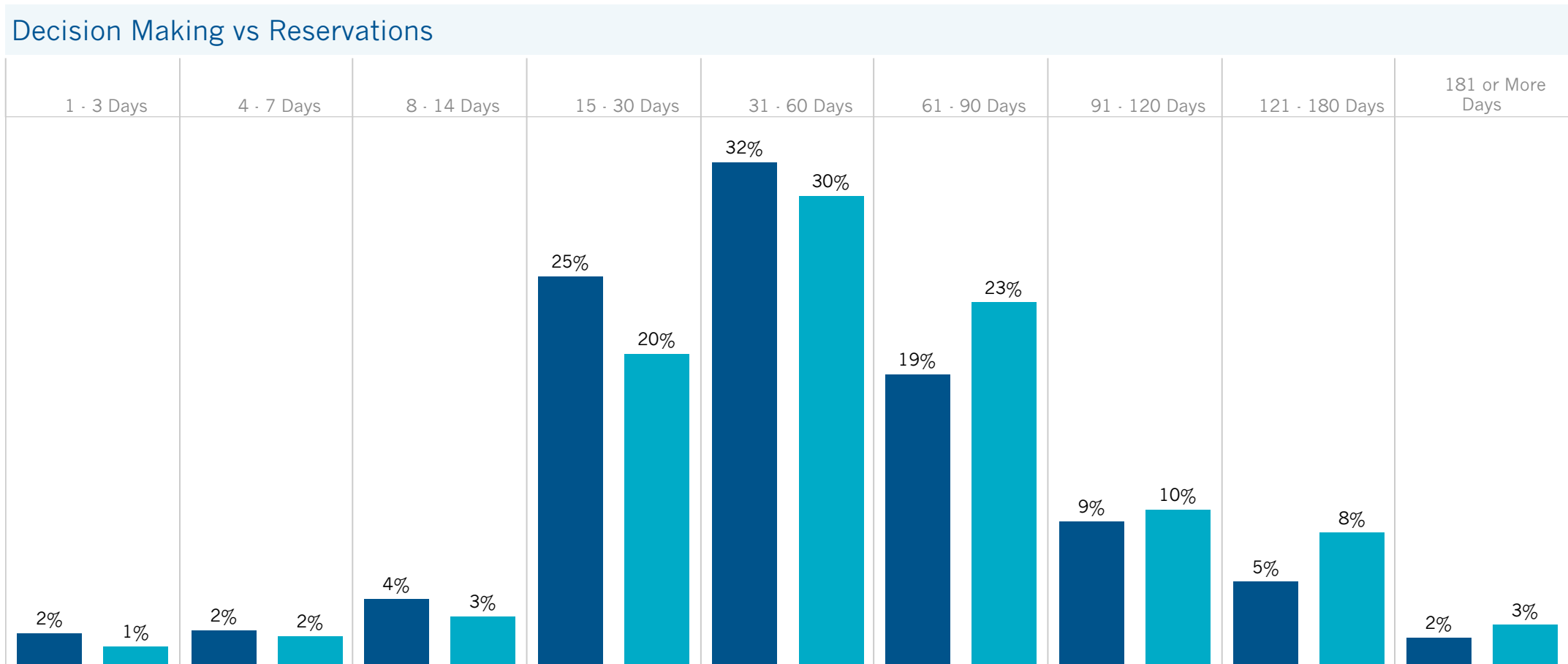




Decision Making vs Reservations

The chart below shows the timeframe for making the decision to travel and making the reservations among travelers in the focus market..

Japan



■ How many days prior to departure did you make air travel reservations? (%)

■ How many days prior to departure did you make the decision to travel? (%)



Airline Reservations

The chart below shows how airline reservations were made for the trip among travelers in the focus market.

Japan

Airline Reservations



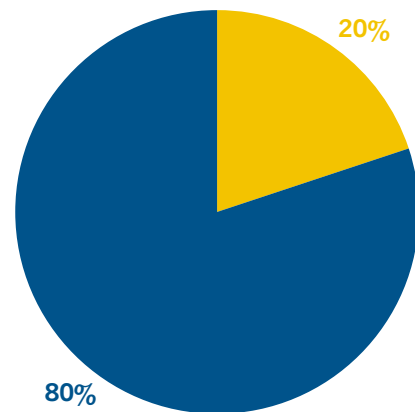


First/Repeat Visitation, Travel Party Size

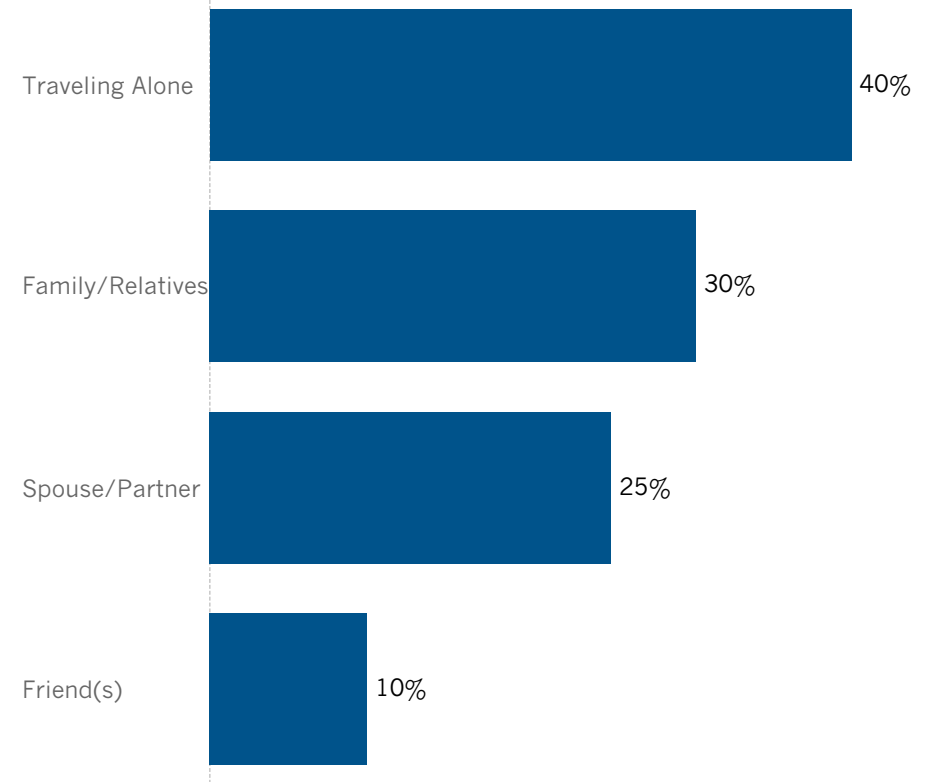
The charts below show first-time and repeat visitation and travel party size among travelers from the focus market.

Japan

First trip to the US



Travel Companion



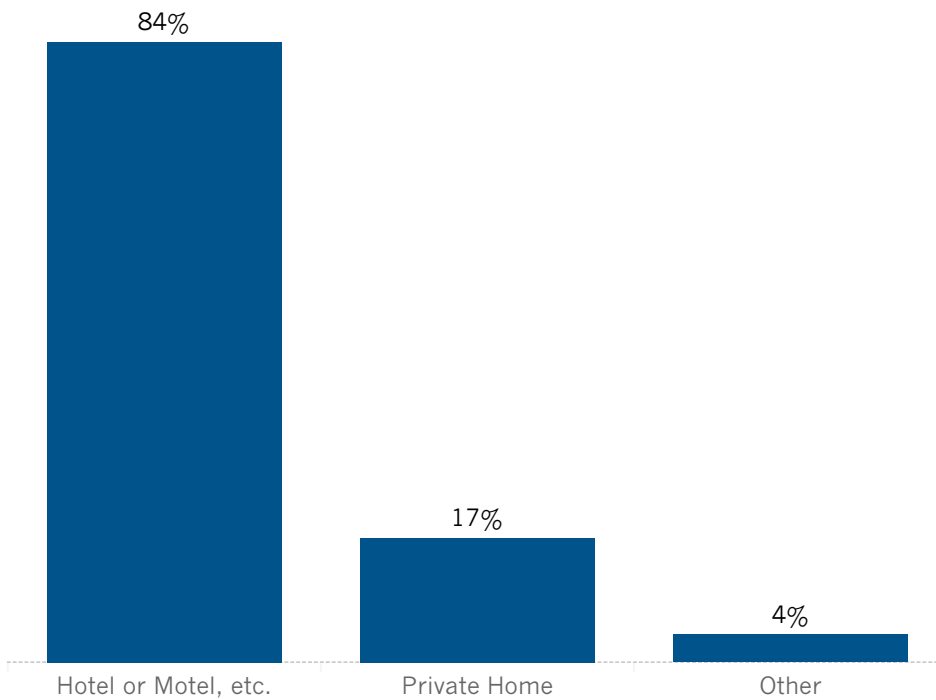


Types of Accommodations & Nights

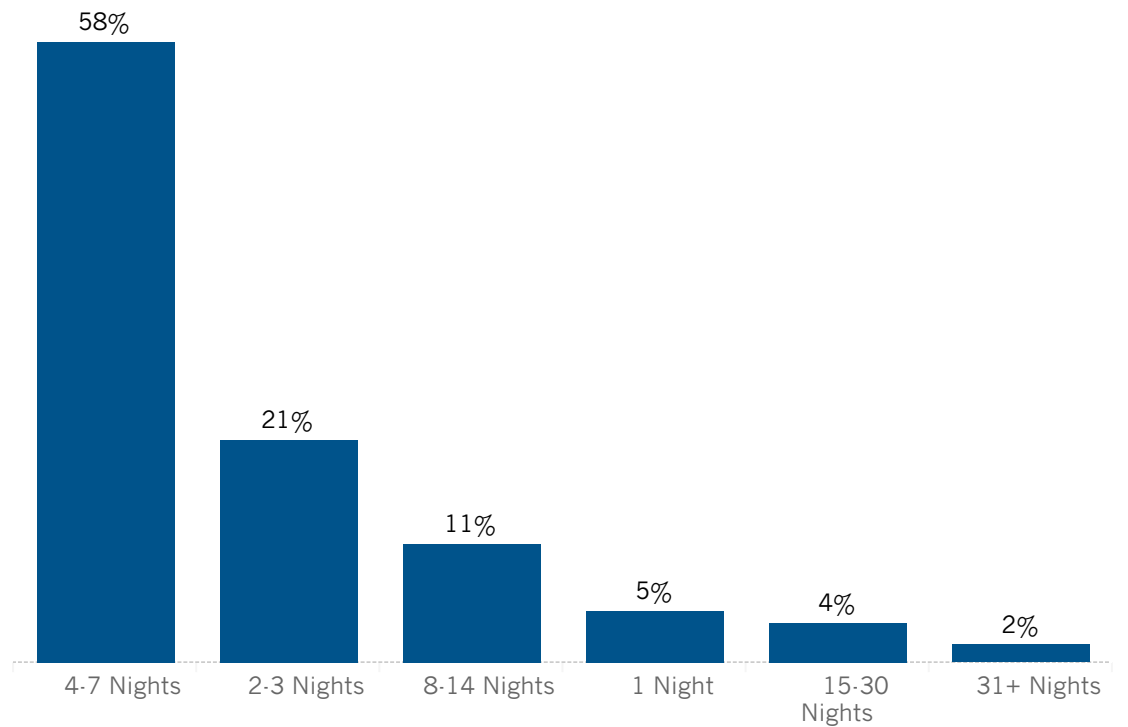
The charts below show types of accommodations stayed in and number of nights in destination among travelers from the focus market.

Japan

Types of Accommodations



Nights in Destination



Q. Type of accommodations in the destination
Q. Overall nights in destination

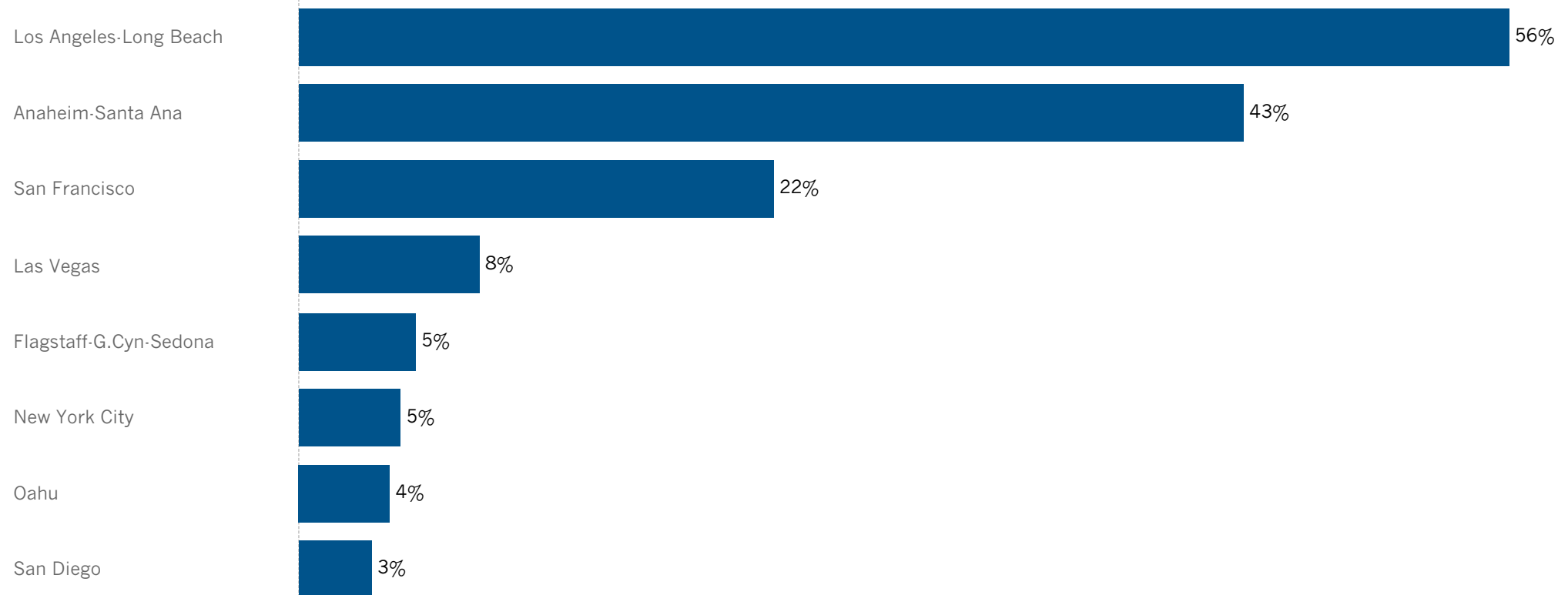


Destinations Visited

The chart below shows top U.S. destinations visited on a trip among travelers from the focus market.

Japan

US Destinations visited



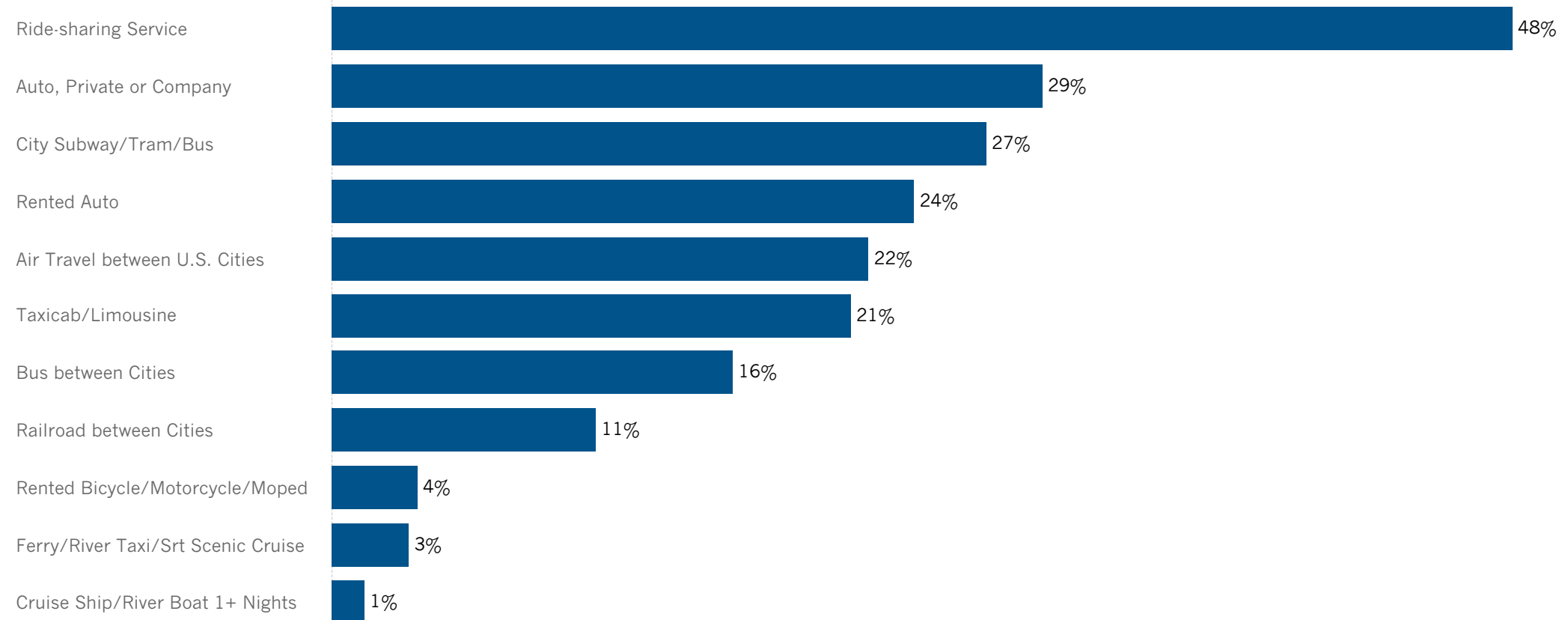


Transportation

The chart below shows the types of transportation used on the trip among travelers in the focus market.

Japan

Types of Transportation



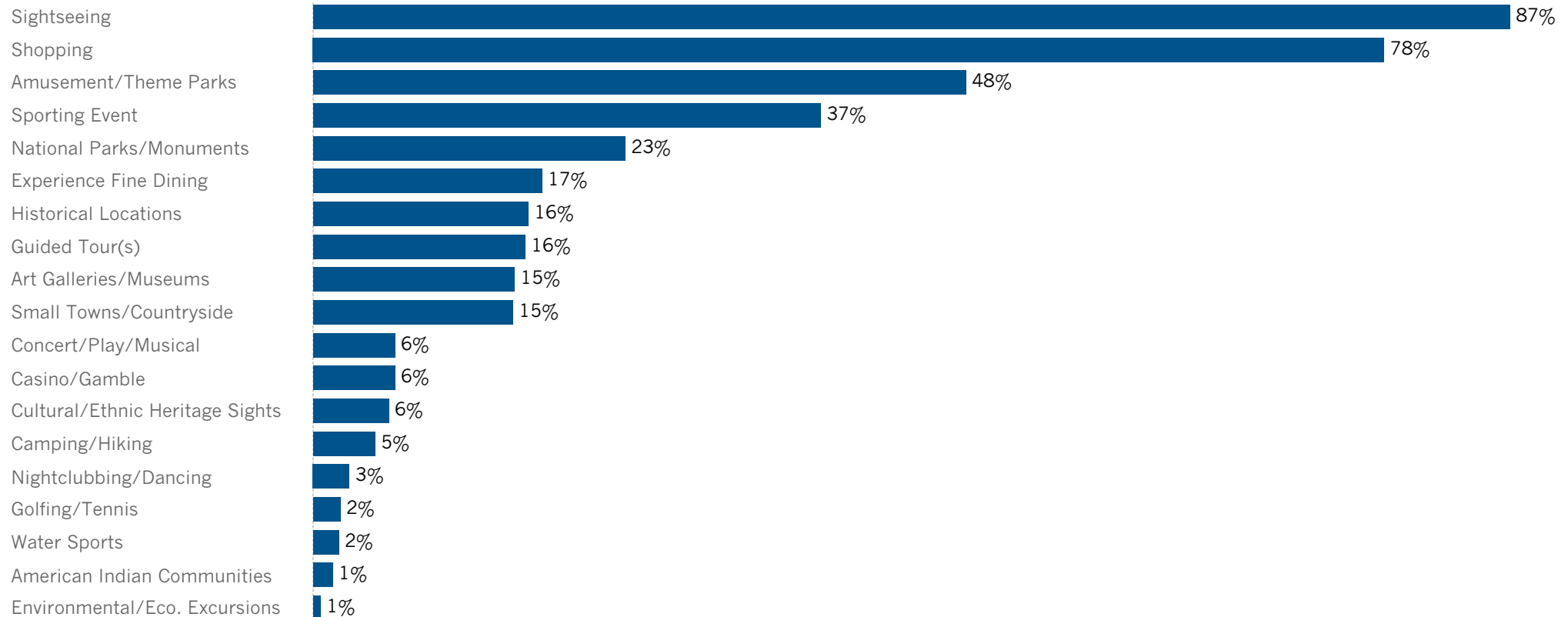


Activities

The chart below shows the leisure activities engaged in on a U.S. trip among travelers to California from the focus market.

Japan

Engaged Activities





Expenditures in the US

The chart below shows mean expenditures by category among travelers to California from the focus market.

Japan

Expenditures per visitor

