

Toward a timely reading of “the signs of change” in tourism

## The Number of Foreign Visitors and Visit Ratio by Prefecture

Advance estimation of monthly indexes: December report

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### Main points

#### ● Advance estimates of the number of foreign visitors and visit ratios by prefecture in December\*

▶ The estimated number of foreign visitors in Greater Kansai area in December is 4,144 in Fukui, 17,989 in Mie, 15,803 in Shiga, 718,192 in Kyoto, 998,554 in Osaka, 120,083 in Hyogo, 347,630 in Nara, 29,154 in Wakayama, 8,313 in Tottori, 6,389 in Tokushima (Table 1 and Figure 1). Since the actual values of the visit ratios during the Jul-Sep quarter of 2019 are available, we updated our estimates of the number of foreign visitors.

▶ By major region (or Transport Bureau district as defined by MLIT) the respective numbers are 188,916 in Hokkaido, 1,290,876 in Kanto, 382,664 in Chubu, 1,070,130 in Kansai (Kinki), and 189,160 in Kyushu (Table 1 and Figure 1).

▶ The estimated visit ratios by prefecture in Greater Kansai in December are 0.2% in Fukui, 0.7% in Mie, 0.6% in Shiga, 28.4% in Kyoto, 39.5% in Osaka, 4.8% in Hyogo, 13.8% in Nara, 1.2% in Wakayama, 0.3% in Tottori, and 0.3% in Tokushima (Table 2 and Figure 2). The visit ratios decreased MoM in all prefectures.

▶ By major region, the estimated December visit ratios are 7.5% in Hokkaido, 51.1% in Kanto, 15.2% in Chubu, 42.4% in Kansai (Kinki), and 7.5% in Kyushu. On a MoM basis, the visit ratio increased only in Kyushu, while it decreased in the other regions (Table 2 and Figure 2).

#### ● Review of December data

▶ According to JNTO estimates (Table 3), the total number of foreign visitors in December was 2,526,400, a -4.0% YoY decrease, marking the third consecutive month of negative growth. The total number of foreign visitors in 2019 was 31,882,000, a +2.2% increase from the previous year. While the number of Korean visitors declined sharply on a YoY basis, the number of visitors from 19 other major countries showed a marked growth (+16.7% YoY).

▶ The top five inbound nationalities were China (710,200 visitors, +18.5% YoY), Taiwan (348,300 visitors, +3.7% YoY), Hong Kong (249,600 visitors, +19.2% YoY), South Korea (248,000 visitors, -63.6% YoY), and Thailand (164,900 visitors, +28.5% YoY).

▶ The growth in visitor numbers from China remained positive for the 15<sup>th</sup> consecutive month in December. Visitor numbers from Taiwan and Hong Kong increased too, for the 5<sup>th</sup> and 4<sup>th</sup> month in a row, respectively. On the other hand, the number of South Korean visitors dropped for the 6<sup>th</sup> consecutive month, but the decline slightly attenuated MoM (from -65.1% in November).

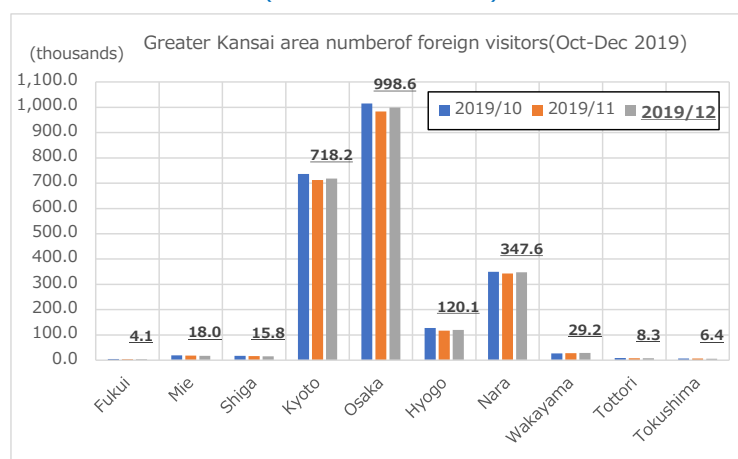
Table 1 Number of foreign visitors by prefecture  
(advance estimates)

| Prefecture | 2019/10   | 2019/11 | 2019/12 | 19Q3      | 19Q4      |
|------------|-----------|---------|---------|-----------|-----------|
| Fukui      | 4,720     | 4,228   | 4,144   | 17,160    | 13,092    |
| Mie        | 19,275    | 18,103  | 17,989  | 68,639    | 55,367    |
| Shiga      | 17,263    | 16,227  | 15,803  | 60,059    | 49,293    |
| Kyoto      | 736,765   | 712,409 | 718,192 | 2,565,365 | 2,167,366 |
| Osaka      | 1,015,027 | 983,017 | 998,554 | 3,500,565 | 2,996,597 |
| Hyogo      | 127,171   | 116,709 | 120,083 | 480,470   | 363,963   |
| Nara       | 350,177   | 342,946 | 347,630 | 1,184,015 | 1,040,754 |
| Wakayama   | 27,589    | 28,232  | 29,154  | 94,378    | 84,975    |
| Tottori    | 9,060     | 8,216   | 8,313   | 34,319    | 25,588    |
| Tokushima  | 7,131     | 6,686   | 6,389   | 25,739    | 20,206    |

| Transport Bureau | 2019/10   | 2019/11   | 2019/12   | 19Q3      | 19Q4      |
|------------------|-----------|-----------|-----------|-----------|-----------|
| Hokkaido         | 203,327   | 190,598   | 188,916   | 652,066   | 582,841   |
| Kanto            | 1,338,839 | 1,290,271 | 1,290,876 | 4,573,042 | 3,919,987 |
| Chubu            | 391,351   | 380,903   | 382,664   | 1,312,712 | 1,154,918 |
| Kinki            | 1,082,119 | 1,050,257 | 1,070,130 | 3,740,800 | 3,202,506 |
| Kyushu           | 193,013   | 179,036   | 189,160   | 729,284   | 561,209   |

Note: The numbers also include visits for purposes other than leisure. The visit ratios for each prefecture are based on multiple answers. Accordingly, the number of foreign visitors in each major region is less than the sum of the visitor numbers of the individual prefectures in that region, as it excludes persons who visited several prefectures within the region. Actual values are highlighted.

Figure 1 Number of foreign visitors by prefecture  
(advance estimates)



Note: The numerical values are forecasts for the three most recent months.

\* The advance estimation is conducted as follows. First, we turn the quarterly visit ratio by prefecture into monthly data, and we use it to estimate a time series model. Then we make a forecast for the visit ratio in the next 6 months. By multiplying this newly obtained visit ratio with the number of foreign visitors provided each month by the JNTO, we estimate the number of foreign visitors on a monthly basis. This procedure is repeated until the actual values of the visit ratio are released. The estimation is based on a technique we use for our very short-term forecasts of the trends in the Japanese economy. For a detailed explanation, refer to APIR's Trend Watch No. 54 (May 2019).

Table 2 Monthly visit ratio (advance estimates)

| Visit ratio(%) |         |         |         |       |       |
|----------------|---------|---------|---------|-------|-------|
| Prefecture     | 2019/10 | 2019/11 | 2019/12 | 19Q3  | 19Q4  |
| Fukui          | 0.19    | 0.17    | 0.16    | 0.20  | 0.16  |
| Mie            | 0.77    | 0.74    | 0.71    | 0.80  | 0.71  |
| Shiga          | 0.69    | 0.66    | 0.63    | 0.70  | 0.63  |
| Kyoto          | 29.51   | 29.18   | 28.43   | 29.90 | 28.43 |
| Osaka          | 40.66   | 40.27   | 39.52   | 40.80 | 39.52 |
| Hyogo          | 5.09    | 4.78    | 4.75    | 5.60  | 4.75  |
| Nara           | 14.03   | 14.05   | 13.76   | 13.80 | 13.76 |
| Wakayama       | 1.11    | 1.16    | 1.15    | 1.10  | 1.15  |
| Tottori        | 0.36    | 0.34    | 0.33    | 0.40  | 0.33  |
| Tokushima      | 0.29    | 0.27    | 0.25    | 0.30  | 0.25  |

| Transportation Bureau |         |         |         |       |       |
|-----------------------|---------|---------|---------|-------|-------|
|                       | 2019/10 | 2019/11 | 2019/12 | 19Q3  | 19Q4  |
| Hokkaido              | 8.14    | 7.81    | 7.48    | 7.60  | 7.48  |
| Kanto                 | 53.63   | 52.85   | 51.10   | 53.30 | 51.10 |
| Chubu                 | 15.68   | 15.60   | 15.15   | 15.30 | 15.15 |
| Kinki                 | 43.34   | 43.02   | 42.36   | 43.60 | 42.36 |
| Kyusyu                | 7.73    | 7.33    | 7.49    | 8.50  | 7.49  |

Note: Actual values are highlighted.

Figure 2 Monthly visit ratios (advance estimates)

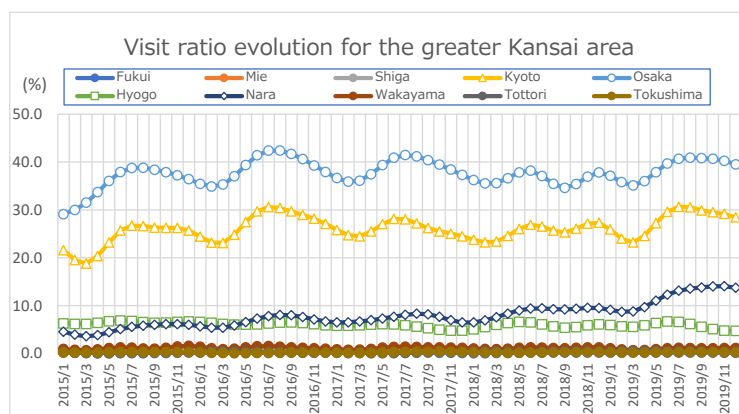


Table 3 Foreign visitors in December 2019 (JNTO estimates)

| Country/Area                          | Total     |           |                | Total      |            |                |
|---------------------------------------|-----------|-----------|----------------|------------|------------|----------------|
|                                       | 2018      | 2019      | Growth rate(%) | 2018       | 2019       | Growth rate(%) |
|                                       | December  | December  |                | Jan~Dec    | Jan~Dec    |                |
| Grand Total                           | 2,631,776 | 2,526,400 | -4.0           | 31,191,856 | 31,882,100 | 2.2            |
| Major countries total (excl. S.Korea) | 1,864,501 | 2,175,900 | 16.7           | 22,454,187 | 24,916,500 | 11.0           |
| South Korea                           | 681,566   | 248,000   | -63.6          | 7,538,952  | 5,584,600  | -25.9          |
| China                                 | 599,086   | 710,200   | 18.5           | 8,380,034  | 9,594,300  | 14.5           |
| Taiwan                                | 335,790   | 348,300   | 3.7            | 4,757,258  | 4,890,600  | 2.8            |
| Hong Kong                             | 209,454   | 249,600   | 19.2           | 2,207,804  | 2,290,700  | 3.8            |
| Thailand                              | 128,304   | 164,900   | 28.5           | 1,132,160  | 1,319,000  | 16.5           |
| Singapore                             | 87,083    | 100,400   | 15.3           | 437,280    | 492,300    | 12.6           |
| Malaysia                              | 67,627    | 78,300    | 15.8           | 468,360    | 501,700    | 7.1            |
| Indonesia                             | 53,966    | 59,200    | 9.7            | 396,852    | 412,800    | 4.0            |
| Philippines                           | 55,666    | 81,500    | 46.4           | 503,976    | 613,100    | 21.7           |
| Vietnam                               | 24,356    | 30,600    | 25.6           | 389,005    | 495,100    | 27.3           |
| India                                 | 10,272    | 11,700    | 13.9           | 154,029    | 175,900    | 14.2           |
| Australia                             | 63,608    | 72,700    | 14.3           | 552,440    | 621,800    | 12.6           |
| U.S.A.                                | 126,850   | 144,500   | 13.9           | 1,526,407  | 1,723,900  | 12.9           |
| Canada                                | 28,132    | 35,100    | 24.8           | 330,600    | 375,200    | 13.5           |
| United Kingdom                        | 22,888    | 27,700    | 21.0           | 333,979    | 424,200    | 27.0           |
| France                                | 17,728    | 20,300    | 14.5           | 304,896    | 336,400    | 10.3           |
| Germany                               | 12,466    | 13,600    | 9.1            | 215,336    | 236,500    | 9.8            |
| Italy                                 | 8,942     | 11,200    | 25.3           | 150,060    | 162,800    | 8.5            |
| Russia                                | 6,293     | 8,800     | 39.8           | 94,810     | 120,000    | 26.6           |
| Spain                                 | 5,990     | 7,300     | 21.9           | 118,901    | 130,200    | 9.5            |
| Others                                | 85,709    | 102,500   | 19.6           | 1,198,717  | 1,381,000  | 15.2           |

Source: Based on data by Japan National Tourism Organization (JNTO), 17<sup>th</sup> of January 2020