

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: November report

Main points

● Advance estimates of the number of foreign visitors and visit ratios by prefecture in November*

▶ The estimated number of foreign visitors in the Greater Kansai area in November is 4,109 in Fukui, 17,427 in Mie, 16,861 in Shiga, 680,286 in Kyoto, 1,016,511 in Osaka, 167,731 in Hyogo, 291,981 in Nara, 30,026 in Wakayama, 9,365 Tottori, and 4,973 in Tokushima (Table 1 and Figure 1).

▶ By major region, the respective numbers were 186,391 in Hokkaido, 1,261,946 in Kanto, 318,431 in Chubu, 1,030,626 in Kansai, and 261,363 in Kyushu (Table 1 and Figure 1).

▶ The estimated visit ratios by prefecture in Greater Kansai in November are 0.2% for Fukui, 0.7% for Mie, 0.7% for Shiga, 27.9% for Kyoto, 41.6% for Osaka, 6.9% for Hyogo, 12.0% for Nara, 1.2% for Wakayama, 0.4% for Tottori, and 0.2% for Tokushima. There was a MoM decrease in all prefectures except Fukui, whose visit ratio remained unchanged (Table 2 and Figure 2).

▶ By major region, the estimated November visit ratios are 7.6% for Hokkaido, 51.7% for Kanto, 13.0% for Chubu, 42.2% for Kansai, 10.7% for Kyushu. On a MoM basis, the visit ratio expanded in Hokkaido and Kyushu, but it declined in Kanto, Chubu and Kansai (Table 2 and Figure 2).

● Review of November data

▶ According to JNTO estimates, the total number of foreign visitors in November was 2,441,300, a -0.4% YoY decrease, marking the second consecutive month of negative growth (Table 3). The impact of the drop in Korean visitor numbers was significant. However, the total number of visitors from the 19 major countries other than Korea rose sharply (+19.9% YoY).

▶ The top 5 inbound nationalities were China (750,900 visitors, +21.7% YoY), Taiwan (392,100 visitors, +11.4% YoY), South Korea (205,000 visitors, -65.1% YoY), Hong Kong (199,700 visitors, +19.4% YoY), and the US (149,000 visitors, +17.3% YoY).

▶ The growth in visitor numbers from China remained positive for 14 consecutive months, and accelerated substantially MoM (+21.7% YoY, up from +2.1% in October). The increasing number of direct flights between Japan and China seems to have had a major impact. In contrast, the number of visitors from South Korea dropped for the fifth consecutive month. The decline attenuated slightly MoM (-65.1% YoY compared to -65.5% in October).

Table 1 Number of foreign visitors by prefecture

(Advance estimates)

Number of foreign visitors

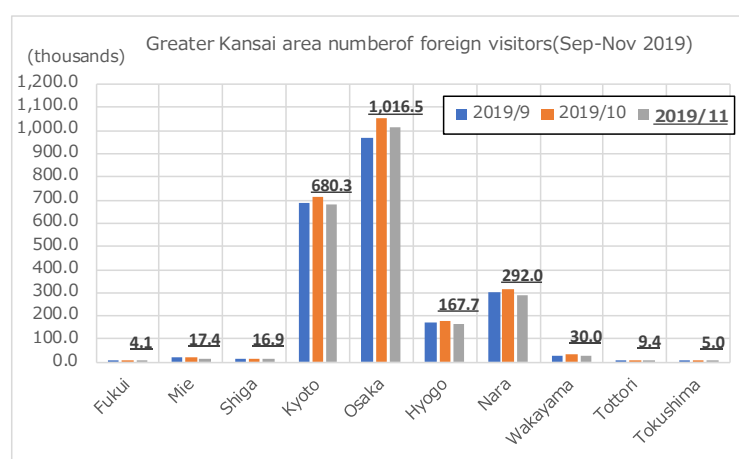
Prefecture	2019/9	2019/10	2019/11	19Q2	19Q3
Fukui	4,003	4,295	4,109	17,160	14,375
Mie	20,276	20,119	17,427	68,639	69,971
Shiga	16,566	18,149	16,861	60,059	56,581
Kyoto	685,508	713,950	680,286	2,539,626	2,439,828
Osaka	969,251	1,053,626	1,016,511	3,406,187	3,290,523
Hyogo	169,753	180,629	167,731	574,848	572,874
Nara	301,478	312,145	291,981	1,055,317	1,053,163
Wakayama	29,543	31,447	30,026	94,378	101,046
Tottori	11,057	11,163	9,365	42,899	38,192
Tokushima	5,455	5,221	4,973	25,739	22,001

Transportation Bureau	2019/9	2019/10	2019/11	19Q2	19Q3
Hokkaido	154,040	189,420	186,391	549,108	454,326
Kanto	1,200,951	1,310,461	1,261,946	4,332,808	4,070,941
Chubu	326,296	345,032	318,431	1,149,695	1,107,427
Kinki	1,006,875	1,072,525	1,030,626	3,689,321	3,504,312
Kyusyu	235,805	261,898	261,363	935,200	815,635

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.

Figure1 Number of foreign visitors by prefecture

(Advance estimates)



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

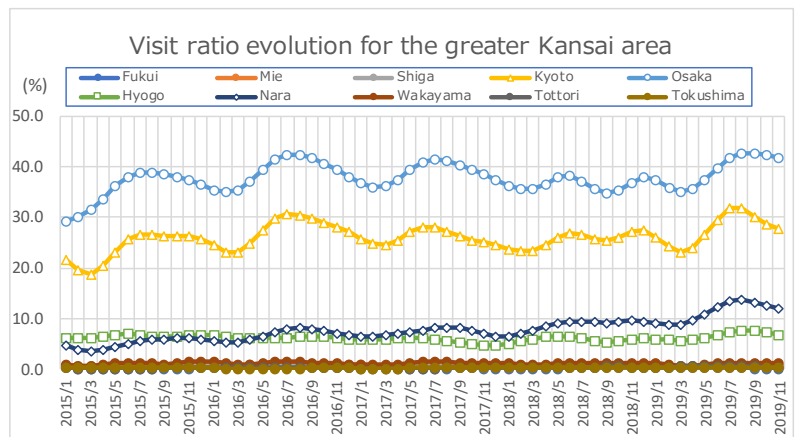
* The advance estimation is conducted as follows. First, we turn the quarterly visit ratio by prefecture into monthly data, and we use it to estimate a time series model. Then we make a forecast for the visit ratio in the next 6 months. By multiplying this newly obtained visit ratio with the number of 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	2019/9	2019/10	2019/11	19Q2	19Q3
Fukui	0.18	0.17	0.17	0.20	0.18
Mie	0.89	0.81	0.71	0.80	0.89
Shiga	0.73	0.73	0.69	0.70	0.73
Kyoto	30.16	28.60	27.87	29.60	30.16
Osaka	42.64	42.20	41.64	39.70	42.64
Hyogo	7.47	7.23	6.87	6.70	7.47
Nara	13.26	12.50	11.96	12.30	13.26
Wakayama	1.30	1.26	1.23	1.10	1.30
Tottori	0.49	0.45	0.38	0.50	0.49
Tokushima	0.24	0.21	0.20	0.30	0.24

Transportation					
	2019/9	2019/10	2019/11	19Q2	19Q3
Hokkaido	6.78	7.59	7.63	6.40	6.78
Kanto	52.84	52.49	51.69	50.50	52.84
Chubu	14.36	13.82	13.04	13.40	14.36
Kinki	44.30	42.96	42.22	43.00	44.30
Kyusyu	10.37	10.49	10.71	10.90	10.37

Figure 2 Monthly visit ratio (advance estimates)



Note: Actual values are highlighted.

Table 3 Foreign visitors in November 2019 (JNTO estimates)

Country/Area	Total			Total		
	2018	2019	Growth rate(%)	2018	2019	Growth rate(%)
	November	November		Jan-Nov	Jan-Nov	
Grand Total	2,450,751	2,441,300	-0.4	28,560,080	29,355,700	2.8
Major countries total (excl. S.Korea)	1,767,609	2,120,200	19.9	20,589,686	22,740,300	10.4
South Korea	588,213	205,000	-65.1	6,857,386	5,336,600	-22.2
China	617,252	750,900	21.7	7,780,948	8,884,100	14.2
Taiwan	351,905	392,100	11.4	4,421,468	4,542,300	2.7
Hong Kong	167,184	199,700	19.4	1,998,350	2,041,200	2.1
Thailand	102,911	140,300	36.3	1,003,856	1,154,000	15.0
Singapore	54,274	65,300	20.3	350,197	391,800	11.9
Malaysia	55,519	65,000	17.1	400,733	423,400	5.7
Indonesia	32,110	37,200	15.9	342,886	353,600	3.1
Philippines	46,965	64,800	38.0	448,310	531,600	18.6
Vietnam	33,986	41,900	23.3	364,649	464,400	27.4
India	13,265	14,900	12.3	143,757	164,200	14.2
Australia	39,840	48,300	21.2	488,832	549,100	12.3
U.S.A.	127,006	149,000	17.3	1,399,557	1,579,400	12.8
Canada	27,638	33,300	20.5	302,468	340,100	12.4
United Kingdom	27,417	37,700	37.5	311,091	396,500	27.5
France	22,058	24,300	10.2	287,168	316,100	10.1
Germany	18,544	19,500	5.2	202,870	222,900	9.9
Italy	11,621	12,400	6.7	141,118	151,600	7.4
Russia	9,272	13,100	41.3	88,517	111,100	25.5
Spain	8,842	10,500	18.8	112,911	122,900	8.8
Others	94,929	116,100	22.3	1,113,008	1,278,800	14.9

Source: Based on data by Japan National Tourism Organization (JNTO), 18th of December 2019