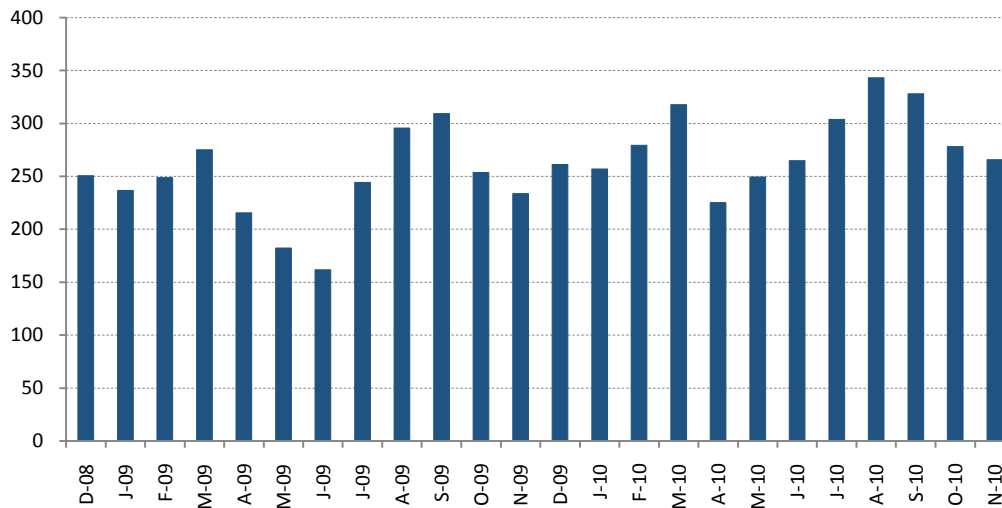


J A P A N

MARKET SUMMARY

- 2,918,268 residents of Japan visited the U.S. in 2009 representing a 10.2% decline from 2008, the fourth consecutive annual decline and the lowest number of arrivals from Japan since 1988.
- Monthly arrivals for November 2010 were 265,615, about 14% better than arrivals for November 2009, and year to date through November 2010 has shown a 17% improvement over the same period of 2009.
- Looking to the end of 2010, Japan arrivals are expected to increase by 14%, for a total of 3,325,000 visitors.
- Japan's economic recovery will continue slow in 2011, with GDP growth of 1.1% in 2011, and real private consumption expected to increase 1.1% in 2011.
- In 2009, the U.S. received a total of \$13.0 billion from Japanese visitors, a decrease of 10.3% compared to 2008. \$9.5 billion was spent on travel while in the U.S., and \$3.6 billion was spent on international airfare.
- Total spending, including spending on international airfare, per Japanese arrival to the U.S. averaged \$4,471 in 2009, a decrease of 4.6% compared to 2008.
- U.S. destinations face strong competition from other Asian countries, especially China and South Korea, to attract the Japanese leisure traveler.

Monthly Arrivals to the U.S. (thousands)



% Change
Nov 10/Nov 09

13.6%

% Change
YTD Nov 10/
YTD Nov 09

17.2%

% Change
Total 09/Total 08

-10.2%

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	YTD Total	Year End Total
2008	271,988	275,865	303,384	226,591	266,812	266,637	286,794	321,429	287,616	257,826	233,975	250,661	2,998,917	3,249,578
2009	236,597	248,810	275,091	215,478	182,173	161,880	244,412	295,840	309,435	253,654	233,742	261,156	2,657,112	2,918,268
2010	257,112	279,432	317,774	225,264	249,420	264,921	303,930	343,300	328,034	278,266	265,615		3,113,068	

Source: [U.S. Department of Commerce, Office of Travel & Tourism Industries](http://www.dhs.gov)