

# Japan - Travel & Tourism: A developed tourist destination (Strategy, Performance and Risk Analysis)

<https://marketpublishers.com/r/J12006C69D4EN.html>

Date: November 2017

Pages: 89

Price: US\$ 1,995.00 (Single User License)

ID: J12006C69D4EN

## Abstracts

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### SUMMARY

Total tourist volumes in Japan increased at a CAGR of 1.9% over the review period (2012-16) to reach 341.9 million in 2016, and are expected to increase at a CAGR of 2.0% over the forecast period (2017-21) to total 377.5 million in 2021. Growth is predominantly attributed to the rising number of domestic tourists, government initiatives to promote the country as a tourist destination, and the increased arrival of tourists from Southeast Asian countries, including Thailand, Malaysia, and South Korea. The relaxation of visa policies by the government for Chinese tourists is also a key driver of growth.

Japan's passenger airlines demonstrated strong growth in terms of seats available and sold. Over the forecast period, revenue will increase at a CAGR of 10.5%, from US\$36.1 billion in 2017 to US\$54.0 billion in 2021. The expected growth is attributed to the rise in revenue of low cost carriers from international routes to Southeast Asian countries, as well as the launch of new direct international routes.

MarketLine Premium's industry reports provide a comprehensive market view including sections on: risk and reward, key industry trends and drivers, industry SWOT analysis, industry benchmarking to compare key performance indicators with regional and global markets, competitive landscape, industry innovation, deals and key developments.

### KEY HIGHLIGHTS

## Car rental fleet size to increase over the forecast period

Growth in the car rental fleet size is primarily driven by the rise in the number of inbound tourists in Japan, along with governmental initiatives to promote Japan as a travel destination and investments to improve road infrastructure. The increasing number of domestic tourists is also a key contributing factor to increase demand for car rentals.

## Revenue per passenger to increase over the forecast period

In Japan, the average revenue per passenger declined at a CAGR of -4.8%, from US\$844.0 in 2012 to US\$692.5 in 2016 due to the devaluation of the country's currency. However, it is forecast to increase at a CAGR of 5.3%, from US\$765.0 in 2017 to US\$941.52 in 2021 with the rise in revenue per passenger for full service and low cost carrier airlines at a CAGR of 4.6% and 6.8%, respectively.

## International arrivals witnessed exponential growth

Over the review period, Japan recorded exponential growth in inbound visitors, reflecting its advancing position as a global tourism destination. The total number of international arrivals increased at a CAGR of 30.2%, from 8.4 million in 2012 to 24.0 million in 2016, and is forecast increase at a CAGR of 10.6%, from 28.5 million in 2017 to reach 42.7 million by 2021. The sharp increase witnessed in international arrivals is due to the rise in tourism from South Korea and Taiwan. Visa relaxations for Chinese tourists also stimulated growth in packaged and individual tours from China.

## SCOPE

**Risk & Reward Index** - This compares the position of the Japanese travel and tourism industry with regards to other countries in the region in terms of specific risk and reward parameters.

**Industry Snapshot and Industry View** - Key travel and tourism industry statistics, including total revenue and expenditure for key industry segments and the trends driving market performance in the Japanese travel and tourism market.

**Industry SWOT Analysis** - Discover the Strengths, Weaknesses, Opportunities and Threats impacting market performance and investment in the Japanese travel and tourism market.

Industry Benchmarking - Benchmark how the Japanese travel and tourism market is performing compared to regional and global markets in terms of car rental fleet size, car rental revenue, number of hotels, hotel revenue, passenger airline revenue, seats available and seats sold, revenue of travel intermediaries and tourism expenditure growth.

Competitive Landscape - Overview of relevant players in the Japanese travel and tourism industry such as airlines, hotels and car rental companies, with each player in the relevant category compared with its peers in terms of relevant industry indicators.

## **REASONS TO BUY**

How is the market performing in terms of indicators such as total tourist visits, passenger airline seats sold, seats sold by purpose of visit such as leisure, revenue, room nights available, room nights occupied, hotel revenue, car rental days among others.

How risky is it to invest in the Japanese travel and tourism industry compared to other countries in the Asia-Pacific?

What is driving the performance of key industry segments such as passenger airlines, accommodation and car rentals?

Who are the leading players in the Japanese travel and tourism industry and their overview and product portfolio?

What trends are being witnessed within the Japanese travel and tourism industry?

What are the Japanese travel and tourism industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

What are the recent developments and innovations in the Japanese travel and tourism industry?

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