

# Consumer Demand Project 2019 Japan Market Fact Sheet



## Current Japan Visitation and Expenditure in Australia<sup>1</sup>

Japanese visitors numbers grew 8.8 per cent in the year ending September 2019 to reach 455,000 visitors staying 10.9m nights in Australia. During the same period Overnight Visitor Expenditure (OVE) in Australia increased by 10.7 per cent to \$1.2b.



**\$1.2b** spend  
+10.7% year-on-year



**455,000** visitors  
+8.8% year-on-year



**10.9m** nights  
+4.0% year-on-year

## Factors of importance when choosing holiday destination

Safety and security is the most important factor when choosing a holiday destination, and is significantly higher than the other 11 markets. This is followed by good food, wine, local cuisine and produce, also above the market average.

### Top five importance factors

% ranking each factor in their top five most important



**A safe and secure destination** **62%**  
(54%)



**Good food, wine, local cuisine and produce** **56%**  
(35%)



**A destination that offers value for money** **40%**  
(39%)



**World-class natural beauty and wildlife** **38%**  
(49%)



**Rich history and heritage** **34%**  
(29%)

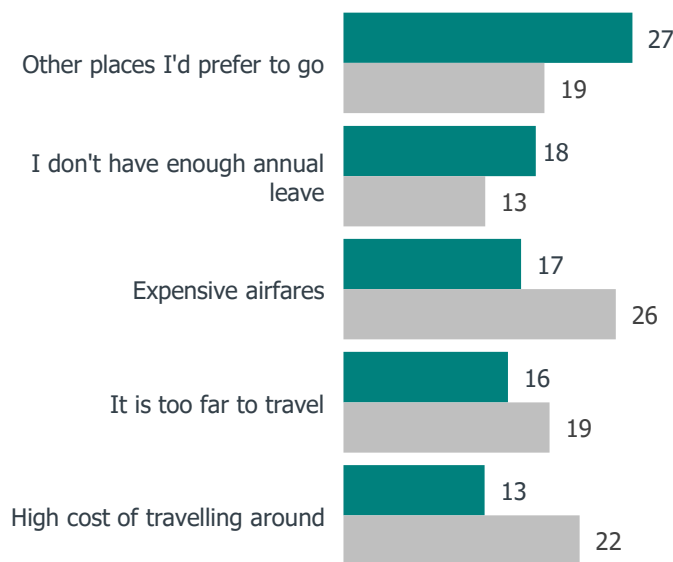
% Japanese travellers (%) 11 Market total<sup>2</sup>

## Barriers to visiting Australia

Compared to the 11 market total, Japanese travellers are more likely to cite preference for other destinations as a barrier to visiting Australia. Not having enough annual leave is also a considerable barrier for Japanese travellers.

### Top five Barriers to Visiting Australia

% of those not intending to visit Australia



■ Japanese travellers ■ 11 Market total<sup>2</sup>

## Research Background

The Consumer Demand Project (CDP) has been run annually by Tourism Australia since 2012. This involves a large sample survey conducted in each of Australia's core international markets, focusing on key demand drivers, travel behaviours and preferences, purchase funnel and brand health metrics. Beginning in 2016, Tourism and Events Queensland and other State Tourism Organisations (STOs) have partnered with Tourism Australia for the project.

Source: Tourism Research Australia Consumer Demand Project (CDP) 2019

<sup>1</sup> Tourism Research Australia, International Visitor Survey, Year Ending September 2019 (spend refers to expenditure in Australia only)  
<sup>2</sup> Aggregate result of all international markets surveyed: China, Germany, India, Indonesia, Japan, Malaysia, NZ, Singapore, South Korea, UK, USA

# Consumer Demand Project 2019 Japan Market Fact Sheet



## Current Japanese Visitation and Expenditure in Queensland<sup>1</sup>

Japanese visitors to Queensland increased by 4.4 per cent in the year ending September 2019 to 215,000. Over the same period, Japanese Overnight Visitor Expenditure (OVE) grew by 21.3 per cent to \$470.5m. Visitors spent 3.7m nights in the state, up 4.3 per cent year-on-year.



**\$470.5m** spend  
+21.3% year-on-year



**215,000** visitors  
+4.4% year-on-year



**3.7m** nights  
+4.3% year-on-year

## Competitive purchase funnel

The funnel shows traveller attitudes to destinations throughout the travel planning cycle. Amongst Australian states and territories, Queensland ranked highest amongst Japanese travellers for consideration, experience awareness and intention. It is also the most visited state.

### Queensland's competitive rankings<sup>3</sup>

ranking against other state and territories by market

	INDO	NZ	SIN	MAL	KOR	JAP	CHI	IND	GER	USA	UK
Consideration	2	1	1	2	3	1	1	3	2	2	2
	3	1	1	3	1	1	1	2	2	2	2
Experience awareness	3	1	2	1	3	1	2	2	1	2	2
	3	1	1	3	1	1	2	3	1	2	2
Intention	3	1	1	1	2	1	1	2	2	2	2
	3	1	1	3	1	1	1	2	2	2	2
Visitation (YE Dec 2018) <sup>4</sup>	4	1	4	4	2	1	3	3	2	2	2
	4	1	4	4	2	1	3	3	2	2	2

■ 2018 rank ■ 2019 rank

**How to read this:**  
Japanese travellers rank Queensland 1<sup>st</sup> out of Australian states and territories for consideration

## Australia's competitive rankings – Japanese market

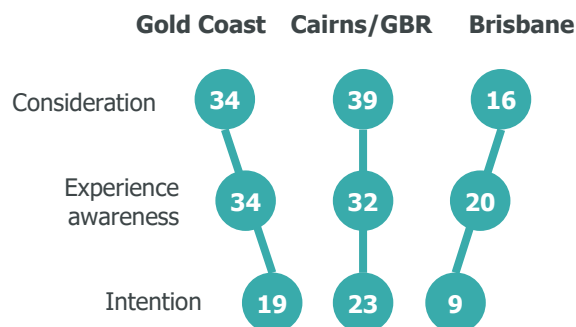
ranking against other international destinations



**How to read this:** Australia comes 3<sup>rd</sup> in the list of destinations Japanese travellers intend to visit, but ranks 10<sup>th</sup> in terms of actual visitation

## Queensland destinations – Japanese market

% of travellers considering Australia



**How to read this:** 34% of Japanese travellers considering visiting Australia have considered visiting the Gold Coast, but only 19% intend to actually visit

<sup>1</sup> Tourism Research Australia, International Visitor Survey, Year Ending September 2019 (spend refers to expenditure in Australia only)  
<sup>3</sup> INDO = Indonesia, SIN = Singapore, MAL = Malaysia, KOR = South Korea, JAP = Japan, CHI = China, IND = India, GER = Germany  
<sup>4</sup> Tourism Research Australia, International Visitor Survey, Year Ending December 2018 (CDP visitation based on December data)

# Consumer Demand Project 2019 Japan Market Fact Sheet



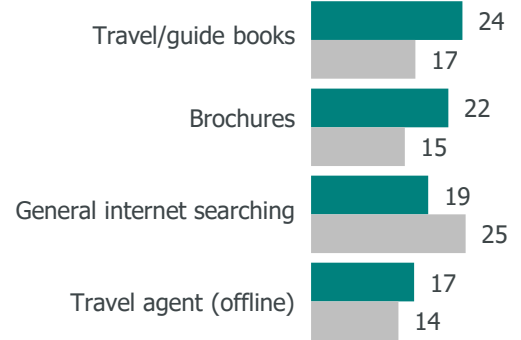
## Sources for travel planning

Compared to the markets, Japanese consumers are more likely to source inspiration from travel/guide books and brochures.

Similarly, offline travel agents were most commonly used for flights, tours, and accommodation bookings, above the rate in the 11 market total.

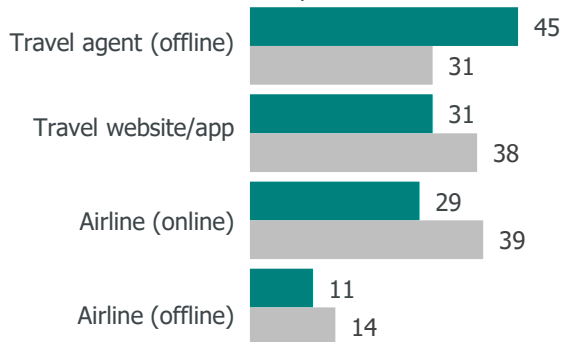
## Sources of inspiration for last trip

% on last OOR<sup>5</sup> trip



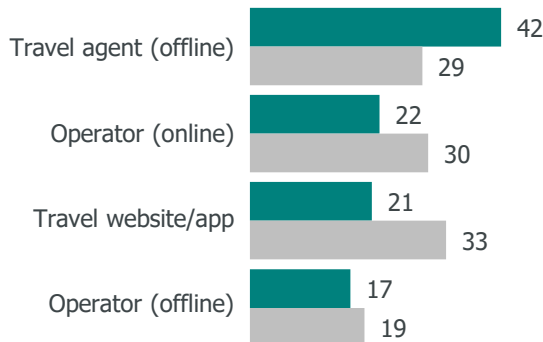
## Sources used to book flights for last trip

% on last OOR<sup>5</sup> trip



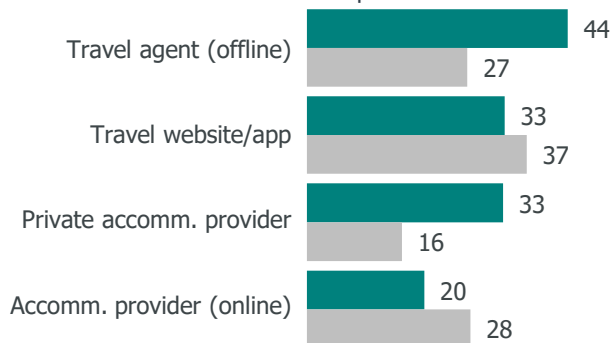
## Sources used to book tours for last trip

% on last OOR<sup>5</sup> trip

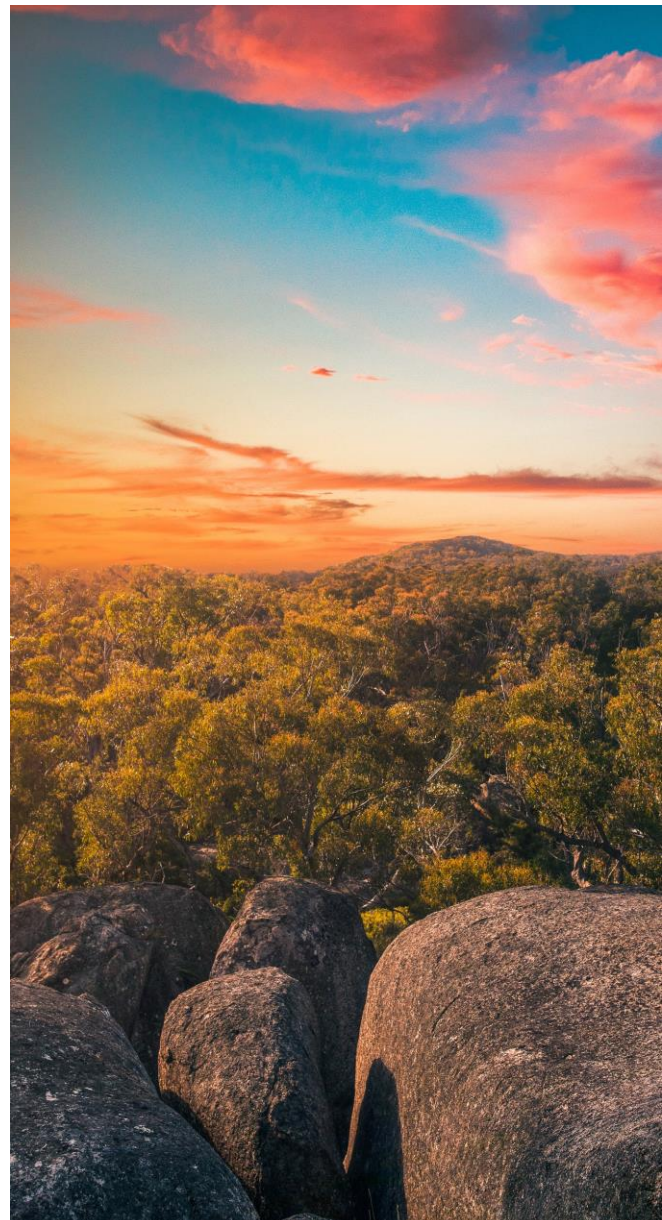


## Sources used to book accommodation for last trip

% on last OOR<sup>5</sup> trip



■ Indonesian travellers    ■ 11 Market total<sup>2</sup>



<sup>2</sup> Aggregate result of all international markets surveyed: China, Germany, India, Indonesia, Japan, Malaysia, NZ, Singapore, South Korea, UK, USA

<sup>5</sup> OOR Trip – Out of Region Trip (Indonesian travelling outside Nepal/Sri Lanka/Maldives/South East Asia [excluding Guam]/Middle East)