

CONSUMER PROFILE JAPAN



SUMMARY

Traveller Profile

Motivations for travel

Japanese travellers choose a destination based on good food and wine, rich history and heritage, world-class nature and aquatic and coastal experiences. A destination must also satisfy the rational factors of safety and security and value for money.

Where are they going?

The most visited destination for Japanese travellers is the USA (including Hawaii), followed by Thailand, Singapore, France and Spain. Australia is 11th on the list in terms of trips taken in 2016, following Italy and Vietnam.

Where do they want to go?

The USA, and particularly Hawaii, is most definitely on their to-do list in the next two years. Australia makes it to second position on both the aspiration and intention lists, but Hawaii is the priority for Japanese travellers.

Who do they travel with?

Over one-third of Japanese consumers travel as a couple.

Perceptions of Australia

Japanese consumers have limited perceptions of Australia's destination offering, focused around iconic cities, nature and beaches.

Australia is highly associated with world-class nature and aquatic and coastal experiences, however these factors are of reduced importance among Japanese consumers. Australia is ranked sixth for food and wine, behind many Western European destinations.

Traveller Behaviour

How do they prefer to travel?

- > Trip length is shorter than the average of international travellers, at six nights featuring an average of three destinations.
- > Preferred styles of travel include resort holidays and city breaks.
- > Less than one-third of trips are tour groups, with a shift towards semi-independent and fully-independent travel in recent years.

When do they travel?

March, August and September are the peak travel months for Japanese consumers, with lead times typically falling between three to six months.

For travel to Australia, specifically, January-March, July-September and December are the peak travel periods for Japanese travellers.

How do they plan to travel?

For early planning and inspiration, Japanese travellers are using a combination of online and offline sources, including reading travel and guide books, talking to travel agents and reading brochures.

How do they book travel?

When it comes to booking, the majority are doing so via a travel agent, either via telephone, in person or online.



TripAdvisor Facts

Japan is the fifth largest international market viewing Australia on TripAdvisor, at 5.1% of all sessions. In 2016 this figure declined by 26.9% year-on-year. Despite Japan's position as the fifth largest international market viewing Australia, this represents a small percentage of all the international destinations they are searching.

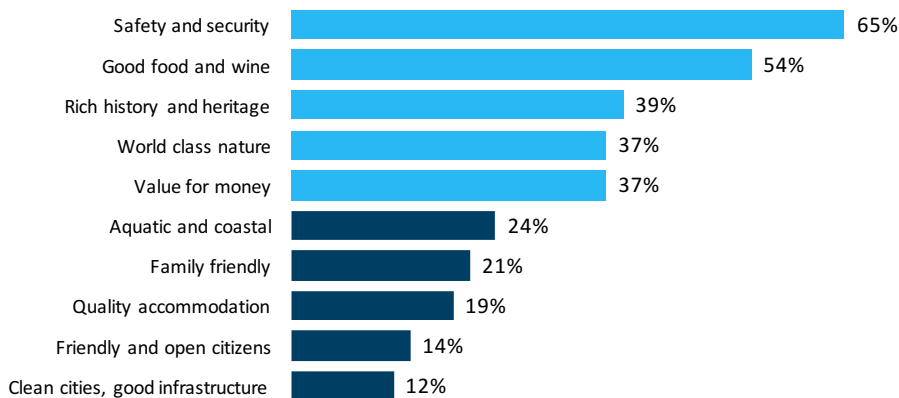
JAPANESE TRAVELLER PROFILE



The information in this fact sheet comes from Tourism Australia's (TA) international consumer research study the 'Consumer Demand Project' (CDP). The CDP was set up in 2012 to look into how global consumers view Australia and what most motivates them to visit.

Insights from the CDP have been used extensively to inform and support development of TA's strategic direction, campaign development as well as to inform the tourism industry of potential opportunities to build the value of Australian tourism. The research is used to help shape the future marketing of Australia and identify opportunities to make the country's tourism offering more attractive to overseas visitors.

Most important factors when selecting a holiday destination



Read as: 65% of respondents rate 'safety and security' among the top five most important factors when choosing a holiday destination.

Notes: *Average nights: the sum of all nights divided by the sum of all visitors. **Median nights: represents the midpoint length of stay for which 50% of visitors stay less and 50% stay longer, removing the impact of very long stay visitors. † Data refers to an average of 2012-2016. ‡ Refers to share of arrivals of respective purpose. † Other includes education, employment and others. Sources: 1. Department of Immigration and Border Protection, December 2016. 2. Tourism Research Australia, International Visitor Survey, December 2016.

MARKET OVERVIEW

In 2016, Japan was Australia's sixth largest inbound market for visitor arrivals, fifth largest market for total visitor spend and ninth for visitor nights.



Holiday[‡]
67%



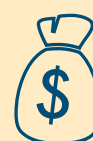
Visiting friends
& relatives[‡]
11%



Business[‡]
10%



Other[‡]
12%



\$1.7bn
Total spend²
(↑ 29 per cent)



**Average nights
stayed[‡]**



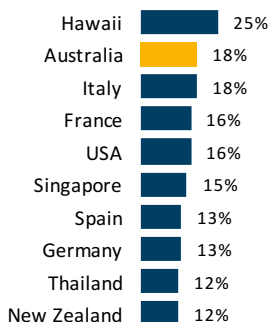
**Median nights
stayed[‡]**

AUSTRALIA'S POSITION AND OPPORTUNITY

Purchase funnel

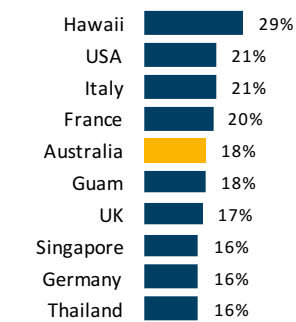
Aspiration

Which of the following destinations are you *considering travelling to* in the next 4 years?



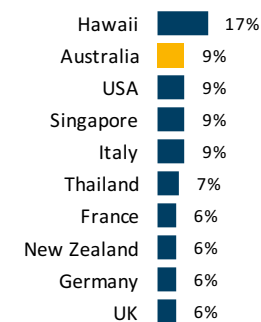
Awareness of holiday experiences

How aware would you say you are of the holiday experiences on offer in the following destinations?



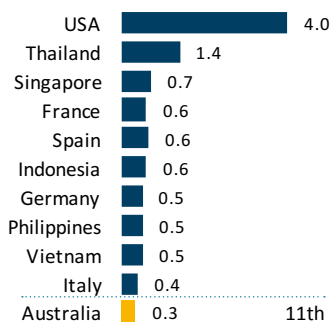
Intention

Which of the following destinations are you *actively planning to visit* for a holiday in the next 2 years?



Visitation

Millions of trips in 2016¹



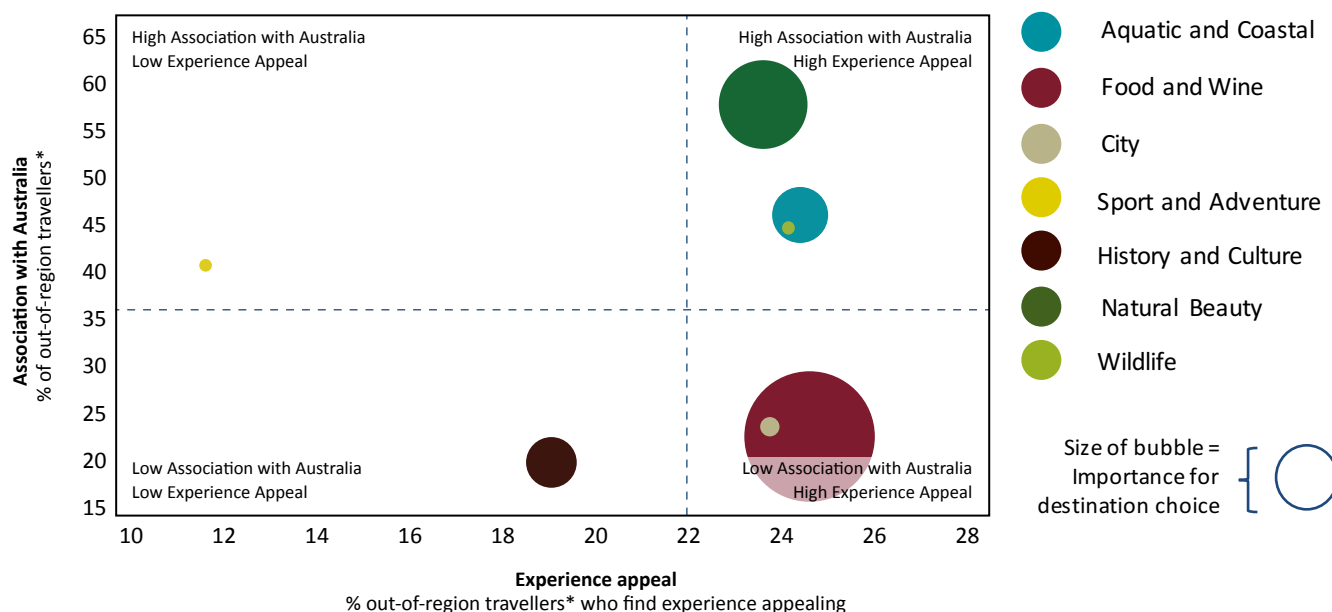
Read as: 18% of Japanese consumers are considering travel to Australia in the next 4 years, while 9% are intending to visit in the next 2 years. Australia is ranked #11 for visitation against other out-of-region (OOR) destinations for Japanese travellers.

Notes: *Hawaii is included in US for visitation figures as cannot be separated. Sources: 1. Tourism Economics, YE2016

Opportunity matrix

The opportunity matrix is a comprehensive way to showcase the opportunity for Australian tourism through identifying the key thematic appeals and experience categories.

Among the Japanese market, Australia performs strongest with respect to natural beauty experiences. These types of experiences have a strong level of appeal and association with Australia (higher and to the right), while food and wine experiences are considered most important (larger bubble). Food and wine experiences generate lower levels of association with Australia among this market.



Read as: Food and wine experiences are very important among the Japanese market, and while there is a high level of tested appeal for Australia's food and wine experiences, the unprompted association with these types of experiences is weaker than average.

Notes: *Out-of-region travellers refers to consumers travelling outside their region of residence.

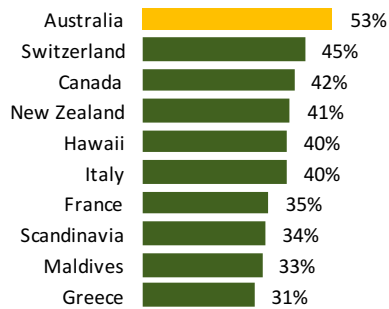
NATURE AND WILDLIFE

How does Australia rate?

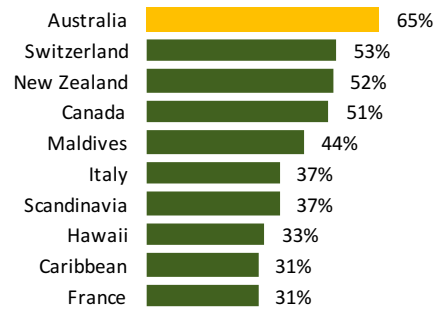
Respondents were asked to indicate which destinations they associated with the following factors. Each respondent was provided with a list in excess of 50 international destinations.

World class nature

Respondents who have not visited Australia



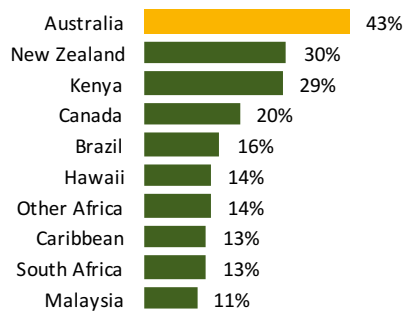
Respondents who have visited Australia



Read as: 53% of respondents who have not visited Australia associate Australia with 'world class nature.' This figure rises to 65% among those who have visited.

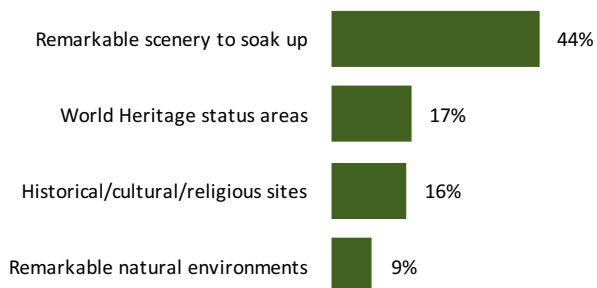
Unique and interesting wildlife

Total respondents



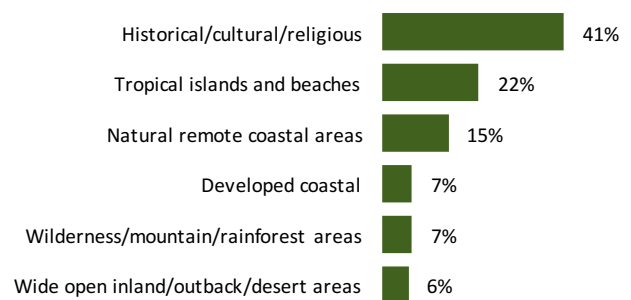
Read as: 43% of total respondents associate Australia with 'unique and interesting wildlife.'

Elements of 'world class nature'



Read as: 44% of respondents said that 'remarkable scenery to soak up' is a key element of 'world class nature'.

Most important types of 'world class nature'



Read as: 41% of respondents said 'historical/cultural/religious' environments are an important type of 'world class nature'.

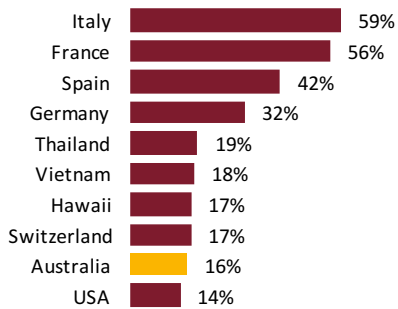
FOOD AND WINE

How does Australia rate?

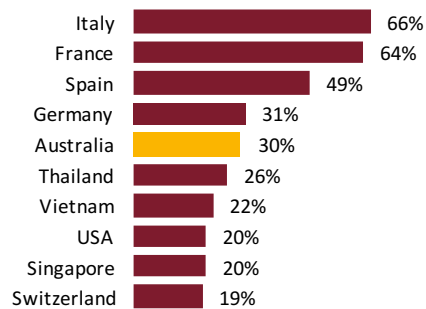
Respondents were asked to indicate which destinations they associated with the following factors. Each respondent was provided with a list in excess of 50 international destinations.

Good food and wine

Respondents who have not visited Australia

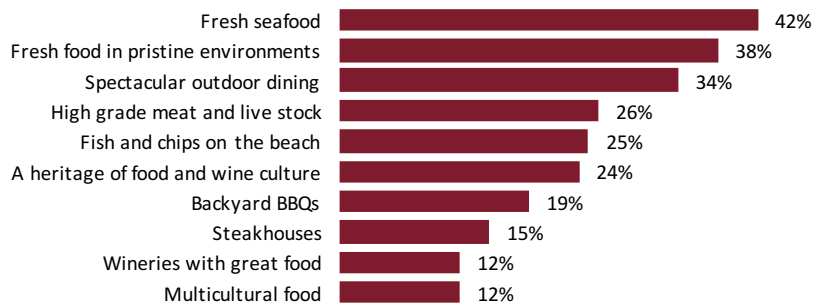


Respondents who have visited Australia



Read as: 16% of respondents who have not visited Australia associate Australia with 'good food and wine.' This figure rises to 30% among those who have visited.

Current associations with Australian food and wine



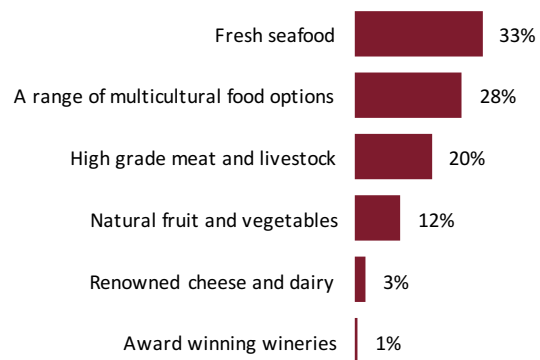
Read as: 42% of respondents associate Australian food and wine with 'fresh seafood'.

Elements of 'good food and wine'



Read as: 47% of respondents said 'a national style of cooking' is a key element of 'good food and wine.'

Important types of 'good food and wine'



Read as: 33% of respondents said 'fresh seafood' is an important type of 'good food and wine.'

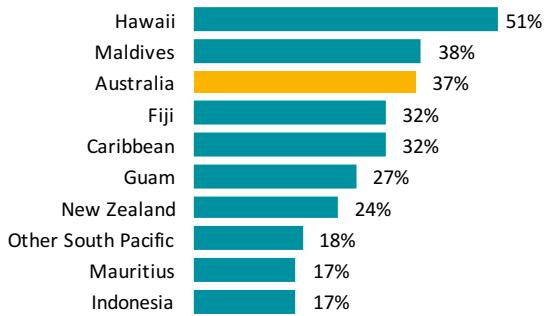
AQUATIC AND COASTAL

How does Australia rate?

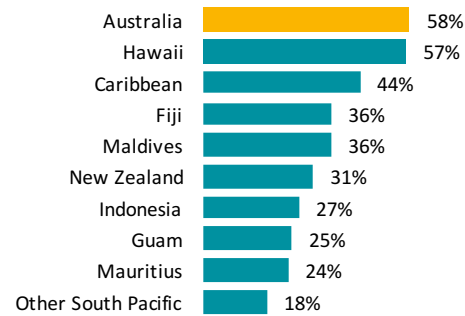
Respondents were asked to indicate which destinations they associated with the following factors. Each respondent was provided with a list in excess of 50 international destinations.

Aquatic and coastal

Respondents who have not visited Australia



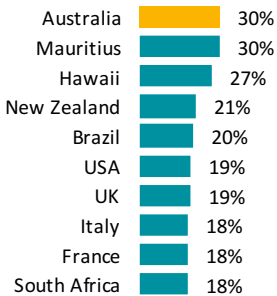
Respondents who have visited Australia



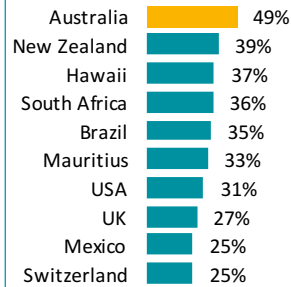
Read as: 37% of respondents who have not visited Australia associate Australia with 'aquatic and coastal' experiences. This figure rises to 58% among those who have visited.

Remote coastal, beach and aquatic locations

Respondents who have not visited Australia



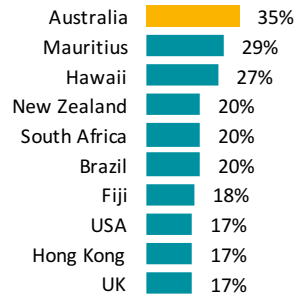
Respondents who have visited Australia



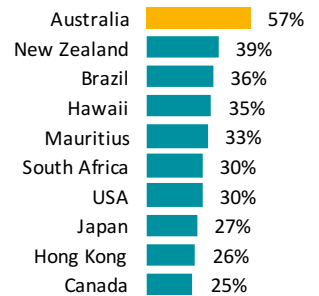
Read as: 49% of respondents that have visited Australia associate Australia with 'remote coastal, beach and aquatic locations'.

Aquatic wildlife

Respondents who have not visited Australia



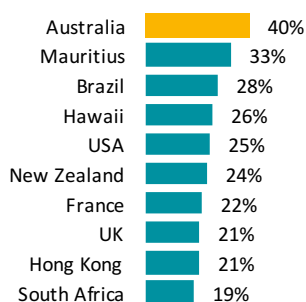
Respondents who have visited Australia



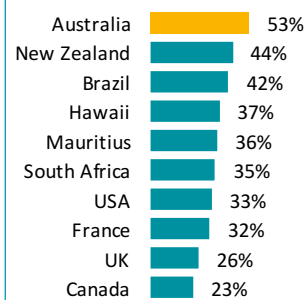
Read as: 57% of respondents that have visited Australia associate Australia with 'aquatic wildlife'.

Developed coastal and beach locations

Respondents who have not visited Australia



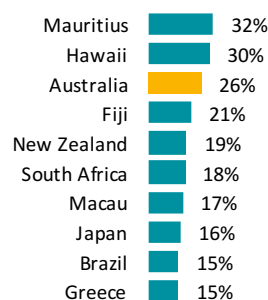
Respondents who have visited Australia



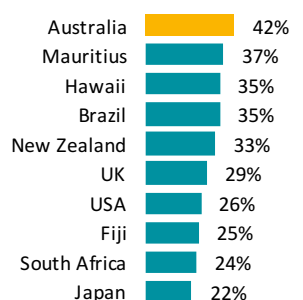
Read as: 53% of respondents that have visited Australia associate Australia with 'developed coastal and beach locations'.

Tropical islands and locations

Respondents who have not visited Australia



Respondents who have visited Australia

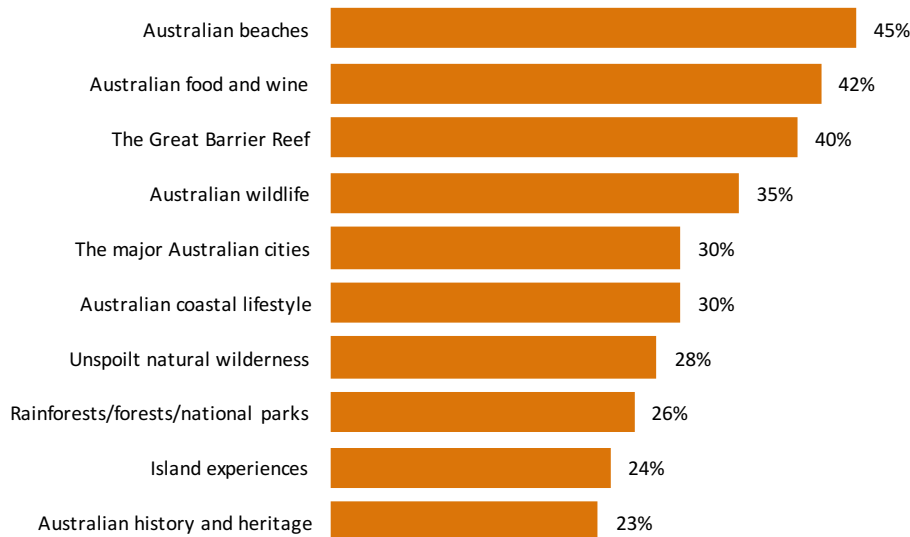


Read as: 42% of respondents that have visited Australia associate Australia with 'tropical islands and locations'.

ATTRACTIONS AND EVENTS

Attractions and events play a valuable role in attracting visitors to Australia in addition to encouraging visitors to disperse throughout the country and extend their stay.

Top 10 Australian attractions

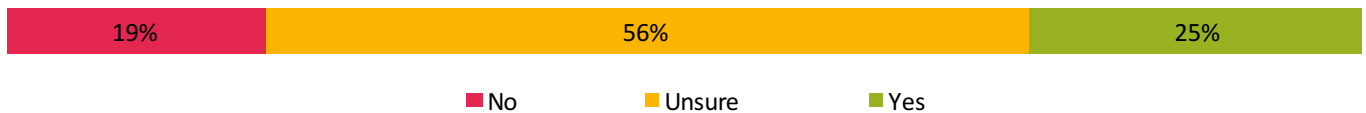


Read as: 45% of respondents indicate 'Australian beaches' as an appealing Australian attraction.

Leisure events

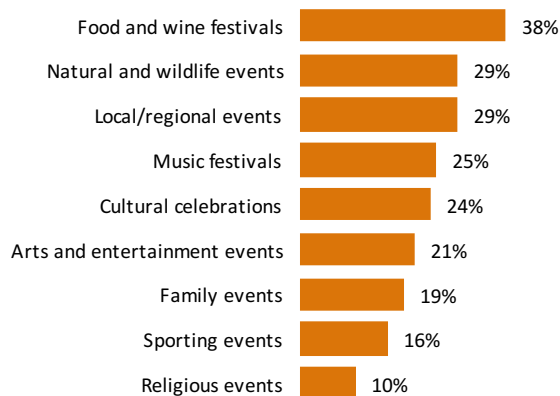
Respondents were asked to what extent they agreed with the following statement:

When travelling internationally I always look to time my trip and places visited with an event or festival of interest.



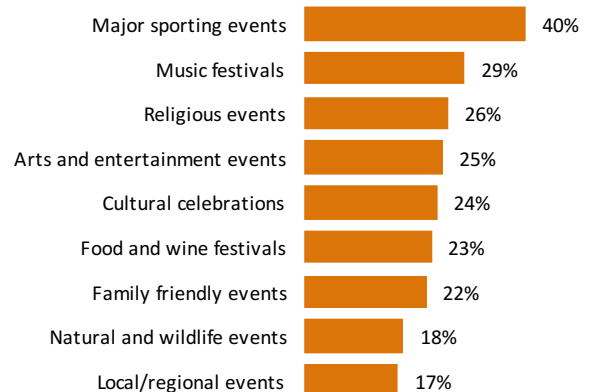
Read as: 25% of respondents indicate that they always look to time their trip and places visited with an event or festival of interest.

Most appealing events to attend overseas



Read as: 38% of respondents indicate 'food and wine festivals' as appealing elements when travelling overseas.

Events with the greatest influence on destination choice



Read as: 40% of respondents indicate the influence of 'major sporting events' on destination choice.

PLANNING AND BOOKING INFORMATION SOURCES

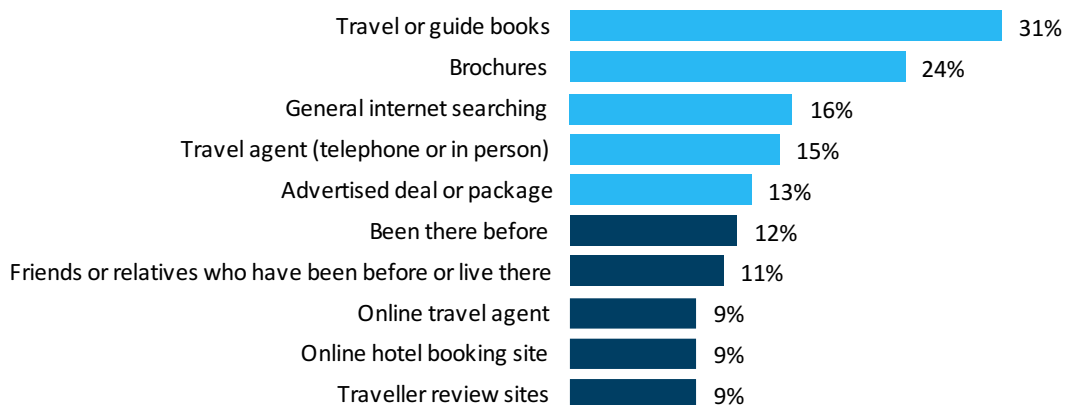
The following charts highlight the information sources that Japanese consumers use to plan and book their holidays.

Preferred sources for *early planning and holiday inspiration*



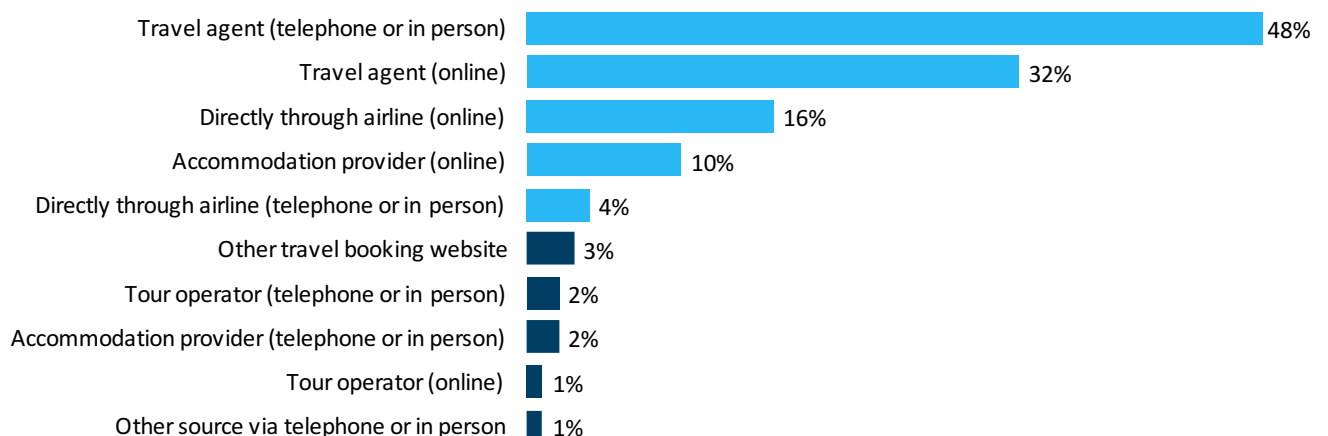
Read as: 25% of respondents indicate 'travel or guide books' as a preferred source during the early stages of planning a holiday.

Preferred sources for *seeking information about a holiday destination*



Read as: 31% of respondents indicate 'travel or guide books' as a preferred source for seeking information about a holiday destination.

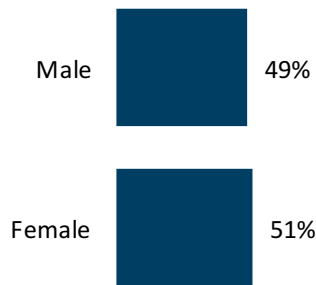
Preferred sources used to *book a holiday*



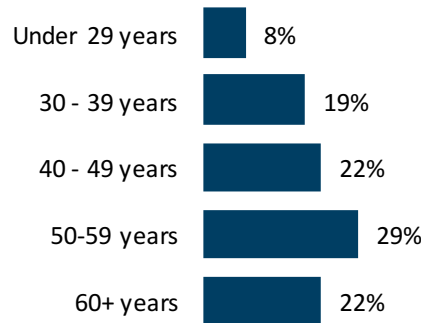
Read as: 48% of respondents indicate 'travel agent (telephone or in person)' as a preferred source when booking a holiday.

RESPONDENT PROFILE

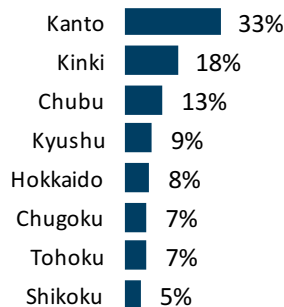
Gender



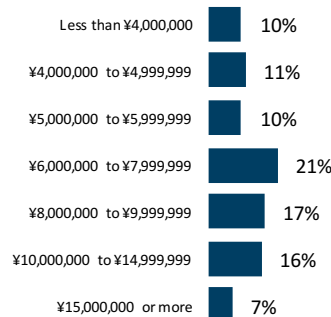
Age



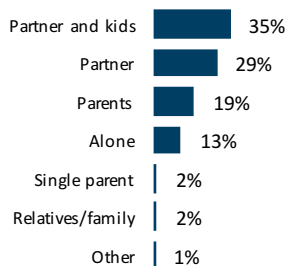
Place of residence



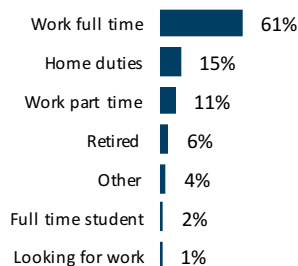
Income



Living situation



Employment status



Occupations



ABOUT THE RESEARCH

The Consumer Demand Project (CDP) research is carried out by BDA Marketing Planning, a consultancy who specialise in international demand side strategy development and consumer research. It helps determine the strategic priorities to achieve the Tourism 2020 goal, by providing a comprehensive assessment of Australia's current destination appeal and the latent demand potential. The research is conducted annually across eleven of Australia's key tourism markets: China, Germany, India, Indonesia, Japan, Malaysia, New Zealand, Singapore, South Korea, UK and USA. In 2016, the following markets were integrated into the project: Hong Kong, Taiwan, Canada, Brazil, France and Italy. Over the last five years, Tourism Australia has spoken to over 90,000 international long-haul travellers via online research panels.

WANT TO KNOW MORE?

Fact sheets for seventeen of Australia's key tourism markets can be accessed at: <http://www.tourism.australia.com/statistics/consumer-demand-research.aspx>

For more information, please contact:

ask.us@tourism.australia.com
www.tourism.australia.com
@TourismAus