Inbound Tourism Statistics

March.2012

Japan Tourism Agency

- National Tourism Survey (General Statistics)
  …No particular change in outbound statistics from last WS.

- Accommodation Survey (General Statistics)
  …Planning to cover camping parks, etc. as “Other” Category.

- Statistics on Inbound Tourists by Prefecture
  …Began listing of Fukuoka City (City designated by government ordinance).

- Regional Tourism Economic Survey
  …Full Scale Survey Starting 2012 following 2011 Pilot Survey v. 2.

- Consumption Trend Survey for Foreigners Visiting Japan
  …No particular changes. But added new analysis.

- Status of Handling by Major Travel Agents
  …Monthly surveys on gross sales, theme-travel plans, etc. gathered by JTA.

- Number of Inbound Tourists
  …Monthly release by the Japan National Tourism Organization (JNTO).

- Number of Japanese Tourists Who Travel Abroad
  …Announced monthly by JNTO.

- Survey on Status of Ryokan (Japanese-style inn) Operation
  …Japan Ryokan and Hotel Association survey of operational conditions, capacity utilization rates, prices, etc.

- Surveys by various Prefectural governments
  …Surveys conducted by Prefectural governments.

※Red : Inbound Tourism Statistics
Consumption Trend Survey for Foreigners Visiting Japan

Contents
◆ Timing : Quarterly
◆ Place of survey : 11 air-sea-ports
◆ Target Respondents : Exiting foreigners
◆ Sample size: 26,000 (6,500/quarter)
◆ Method : CAPI
◆ Subjects:

Survey Scene
○ Planning of tourism policies based on visiting foreigners’ needs and evaluation of effectiveness
  ➢ PDCA cycle based promotion activities based on trends in visiting foreigners
  ➢ Preparation of inbound programs to meet foreign visitor preferences (Grasping nationality-preferred tour courses)
  ➢ Analysis of economic ripple effect of travels by visiting foreigners (in employment, tax incomes, etc.) and cost-effectiveness

○ Vitalization of business of catering to visiting foreigners
  ➢ Use in effective tourism marketing (in developing new tour routs, etc.)
  ➢ Utilization in strategy making for developing sites for commercial facilities

Summary of Consumption Trend Survey for Foreigners Visiting Japan
• Travel spending (transportation, accommodation, etc.) by, and destination, etc. of visiting foreigners (mainly those from the VJC priority market 15 countries and regions) are grasped by nationality, by quarters and by regional blocks.
Introducing of our new analysis.
Regarding cameras, watches, etc.: Chinese visitors showed the highest purchasing rate and high unit cost.

- Overall, cameras, video devices and watches account for about 10%. Chinese buyers ranked top, paying average price of ¥50,000 per person.
- Regarding the camera, most often named item as the most satisfactory item, the reasons for satisfaction ranked from top down, “good quality”, “made in Japan” and “reasonable price and lower than home country”.

**Purchasing Rate Ranking**

<table>
<thead>
<tr>
<th>Rank</th>
<th>Nationality</th>
<th>P. rate</th>
<th>Cost (average)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>China</td>
<td>32.0%</td>
<td>¥50,484</td>
</tr>
<tr>
<td>2</td>
<td>Malaysia</td>
<td>22.8%</td>
<td>¥14,375</td>
</tr>
<tr>
<td>3</td>
<td>India</td>
<td>18.3%</td>
<td>¥32,572</td>
</tr>
<tr>
<td>4</td>
<td>Russia</td>
<td>16.4%</td>
<td>¥34,167</td>
</tr>
<tr>
<td>5</td>
<td>France</td>
<td>12.7%</td>
<td>¥26,708</td>
</tr>
</tbody>
</table>

**The Best Buys (Free answer)**

**Camera (188)**

- **Cannon** (20)
  - **Principal Buyer Segment**
    - [Country], China (6), Taiwan (3)
  - **Sex & age**
    - Male, 30's
  - **Reason for satisfaction**
    - Good quality (8)
    - Made in Japan (8)
    - Low price (3)

- **Sony** (20)
  - **Principal Buyer Segment**
    - [Country], China (11), Hong Kong (3)
  - **Sex & age**
    - Male, 30's
  - **Reason for satisfaction**
    - Good quality (7)
    - Made in Japan (4)
    - Low price (3)

- **Nikon** (15)
  - **Principal Buyer Segment**
    - [Country], China (5), Hong Kong (3)
  - **Sex & age**
    - Male, 20-30's
  - **Reason for satisfaction**
    - Good quality (7)
    - Made in Japan (4)
    - Low price (3)

Note: Data from 2nd quarter 2011; in parentheses are reply sample count.
Post-quake Source of Information in China: Relatively More Influenced by Personal Communication

Ranking of Valuable Pre-departure Information Source (for Chinese Visitors)

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Travel agency brochure</td>
<td>39.0%</td>
<td>25.5%</td>
<td>26.8%</td>
</tr>
<tr>
<td>Travel agency Web site</td>
<td>25.7%</td>
<td>21.4%</td>
<td>21.4%</td>
</tr>
<tr>
<td>JNTO Web site</td>
<td>24.8%</td>
<td>Other Internet sources*</td>
<td>20.4%</td>
</tr>
<tr>
<td>Individual Blog statements</td>
<td>23.8%</td>
<td>Friends/Relatives at home</td>
<td>18.4%</td>
</tr>
<tr>
<td>JNTO Information Center</td>
<td>19.0%</td>
<td>Friends/Relatives in Japan</td>
<td>13.2%</td>
</tr>
</tbody>
</table>

- In China, choosing of travel agency brochure is frequent and the frequency remains high even after the Great Earthquake. Agency Web site visiting rate is also high and it confirms strength of agency’s influence.
- While the use of Internet as info source is popular, influence of the Blog Network, which is popular in neighboring Asian countries is low.
- The weight of information provided by “relatives/friends of home country” and “relatives/friends living in Japan” increased immediately after the Great Earthquake. The former is still valued highly at present.

Note 1) Other Internet sources include Internet sites other than JNTO Web site, travel agent Web sites, hotel Web sites, hotel reservation sites, Blog sites, YouTube and Twitter.
Note 2) Other travel guidebooks include Lonely Planet and all other travel guidebooks other than Michelin Travel Guidebook.

Thank you for your attention.