

Inbound Tourism Statistics

March.2012

Japan Tourism Agency



Japan Tourism Agency Ministry of Land, Infrastructure, Transport and Tourism

Major official statistics on tourism



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.

Others

- **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

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Consumption Trend Survey for Foreigners Visiting Japan

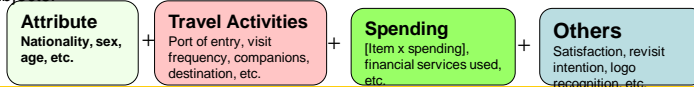
Summary of Consumption Trend Survey for Foreigners Visiting Japan

• 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.

Survey Design

Contents

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



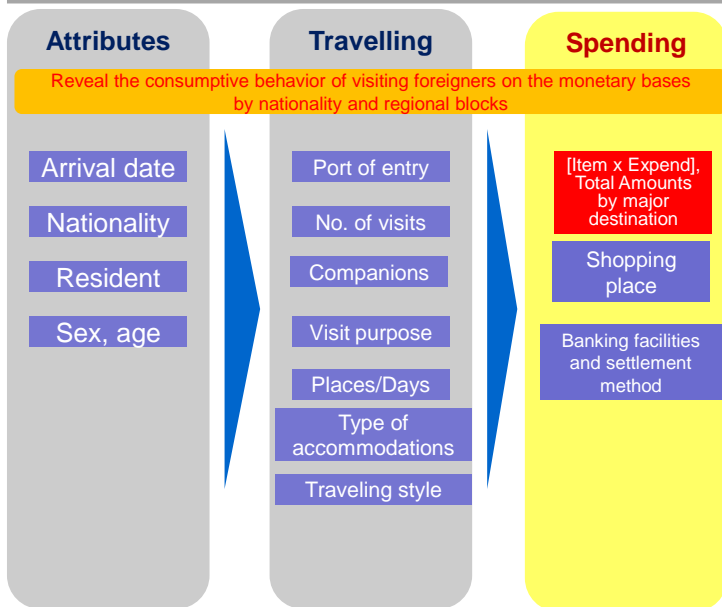
Survey Scene

Usage

- 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

Items of Survey

General Statistics (acknowledged by Statistics Bureau)



Attitude Survey

Satisfaction

- Merchandise, price, reason
- Satisfaction by activity and motivation for revisit
- Overall satisfaction
- Motivation for revisit

Info Source

- Source of information useful before start
- Source of information useful in Japan
- Essential Information

Promotion Awareness

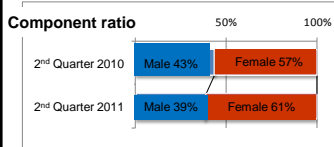
- Logo awareness
- Awareness of navigator for Tourism-Based Country

Introducing of
our new analysis.

Visitors from Taiwan After the Great Quake: Increased Frequently Visiting Tourists and Decreased Visitors with Companions

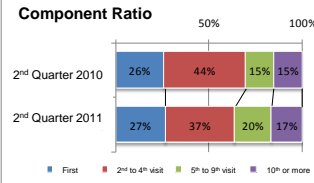
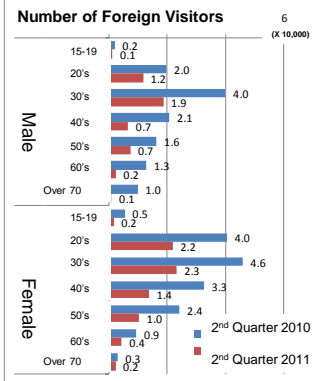
Changes in Visitor (from Taiwan)

a. Sex & Age

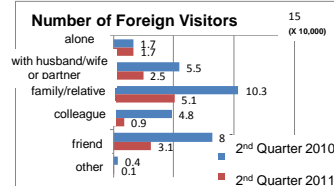
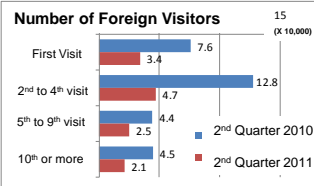
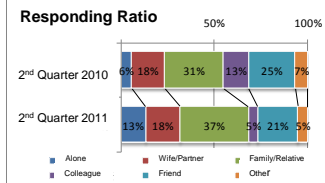


- In this quarter, tourists comprised 66.1% (about 127 thousand) of all Taiwanese visitors.
- The proportion of female among tourists also grew, to about 60%.
- The percentage of first-time visitors remained as previous years, while the proportion of the 2- to 4-time visitors has diminished and the proportion of over 5-time visitors increased from 30 to little less than 40%.
- The proportion of unaccompanied visitors rose from 6% to 13, while that of visitors with colleague at work went down from 13 to 5%.

b. Frequency of Visits to Japan



c. Travel



Note: The number of foreign visitors was trial value calculated as follows: Visitor number = JNTO number of foreign visitors X component ratio.

Regarding cameras, watches, etc.: Chinese visitors showed 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

[Cameras, video cameras, watches]

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

Note: Data from 3rd quarter 2011.

The Best Buys (Free answer)

Hot item, Principal buyer segment & reasons

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)
 [Sex & age] Male, 30's
Reason for satisfaction
 • Good Quality (8)
 • Made in Japan (6)

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)

a. Pre-Quake (4th Q 2010)

Pre-departure Info Source	4 th Quarter 2010
Travel agency brochure	39.0%
Travel agency Web site	25.7%
JNTO Web site	24.8%
Individual Blog statements	23.8%
JNTO Information Center	19.0%

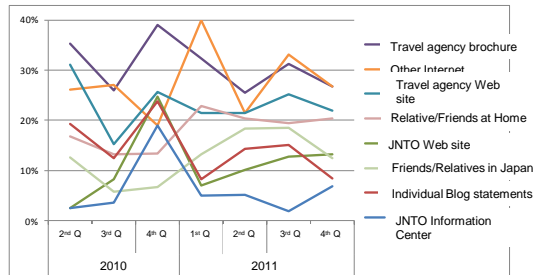
b. Immediate Post-Quake (2nd Q 2011)

Pre-departure Info Source	2 nd Quarter 2011
Travel agency brochure	25.5%
Travel agency Web site	21.4%
Other Internet sources	21.4%
Friends/Relatives at home	20.4%
Friends/Relatives in Japan	18.4%

c. 6 mos. Post-Quake (4th Q 2011)

Pre-departure Info Source	4 th Quarter 2011
Travel agency brochure	26.8%
Other Internet sources*	26.8%
Travel agency Web site	22.0%
Friends/Relatives at Home	20.4%
JNTO Web site	13.2%

- 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 Twitters.
 Note 2) Other travel guidebooks include Lonely Planet and all other travel guidebooks other than Michelin Travel Guidebook.



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Thank you for your attention.