

Market Snapshot

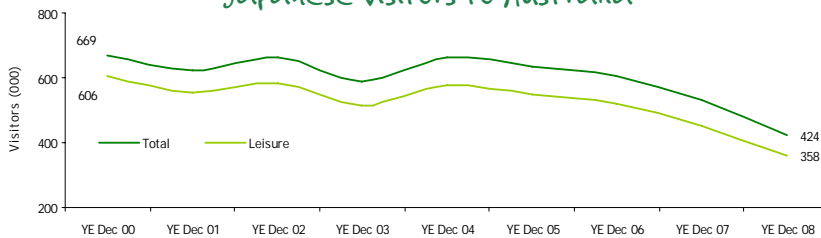
Year ended December 2008

Japan

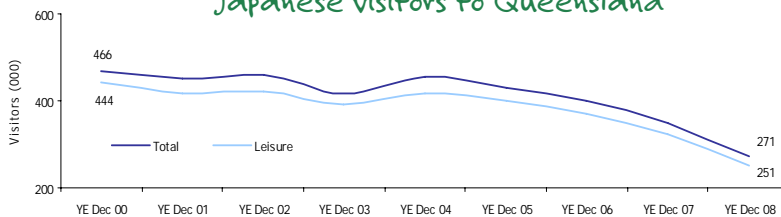


	Australia	Change Dec 07 to Dec 08	Share of international visitors	Queensland	Change Dec 07 to Dec08	Share of visitors to Qld
Total visitors	424,000	-20% ▼	8%	271,000	-23% ▼	13%
Total ALOS ¹ (nights)	20.5	-0.6 ▼		11.5	1.0 ▲	
Leisure² visitors	358,000	-20% ▼	9%	251,000	-22% ▼	14%
Leisure ALOS	14.5	-0.1 ▼		7.8	-0.2 ▼	
Expenditure (\$m)³	992	-15% ▼	6% (share of expenditure)	460	-9% ▼	11% (share of expenditure)

Japanese visitors to Australia



Japanese visitors to Queensland



Japanese visitors to Australia

Japanese visitor numbers to Australia have been in decline from 2004.

First time visitors to Australia accounted for 61% of the Japanese market, this market declined by 22% over the year to December 2008. Repeat visitors also declined (down 18%) over the same period.

Only 30% of Japanese visitors travel alone (lower than the average total international market of 55%). Japanese visitors are more likely to be on a package tour, 61%, compared with 20% for all international visitors to Australia

Family groups travelling together accounted for 20% of the Japanese market. This was higher than the total international market (9%).

Japanese visitors to Queensland

First time visitors (to Australia) accounted for 70% of the Japanese market to Queensland. This market declined by 25% over the year to December 2008.

Tropical North Queensland and the Gold Coast were the State's most visited regions for Japanese visitors. 60% of Japanese visitors to Queensland went to Tropical North Queensland, while 39% had a stop over at the Gold Coast. Japanese to the Gold Coast declined by 28% over the last year, while visitors to Tropical North Queensland declined by 20%.

Japanese spent \$460 million in Queensland in the year to December 2008. This was a decline of 9% on the same period last year.

Japanese spend per visitor in Queensland was \$1,696, lower than the total international average spend (\$1,975).

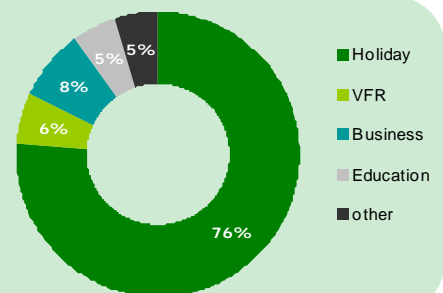
Main purpose of visitation to Australia

The holiday market accounted for over three quarters of all Japanese visitors to Australia. This market declined by 22% over the year to December 2008.

Japanese holiday visitor nights also declined (down 20%) over the year to December 2008. Holiday visitors average length of stay was 14 nights.

The visiting friends or relatives (VFR) market, declined by 12% over the year to December 2008, VFR visitor nights increased however (up by 8%).

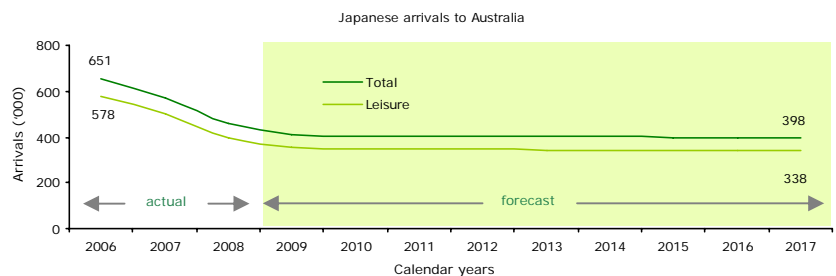
The business market declined (down 6%) over the year to December 2008, business visitor nights declined also with a 3% drop over the same period.



Japanese arrivals forecast⁴

The outbound Japanese market declined by 4% compared with the January to December period in 2007. Australia felt the full impact of this decline as Japanese travellers reigned in travel altogether or substituted closer and cheaper destinations such as Macau and Guam.

In the longer term, Japan is projected to be one of the worst performing inbound markets in the 10 year period to 2017.



1. Average length of stay
 2. Leisure is holiday and visiting friends or relatives (VFR) combined
 3. Expenditure data is sourced from Tourism Research Australia and is inclusive of package expenditure
 4. Tourism Forecasting Committee 2008 Issue 2

Note All data unless specified is from Tourism Research Australia, International Visitor Survey year ended December 2008