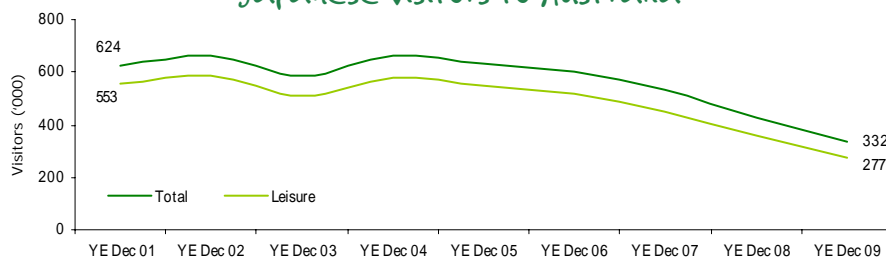


## Japan

	Australia	Change Dec 08 to Dec 09	Share of international visitors	Queensland	Change Dec 08 to Dec 09	Share of visitors to Qld
<b>Total visitors</b>	332,000	-22% ▼	6%	205,000	-24% ▼	10%
Total ALOS <sup>1</sup> (nights)	21.8	1.4 ▲		11.7	0.2 ▲	
<b>Leisure<sup>2</sup> visitors</b>	277,000	-23% ▼	7%	186,000	-26% ▼	11%
Leisure ALOS	14.7	0.2 ▲		8.8	1.0 ▲	
<b>Expenditure (\$m)<sup>3</sup></b>	851	-14% ▼	5% (share of expenditure)	371	-19% ▼	10% (share of expenditure)

### Japanese visitors to Australia



### Japanese visitors to Australia

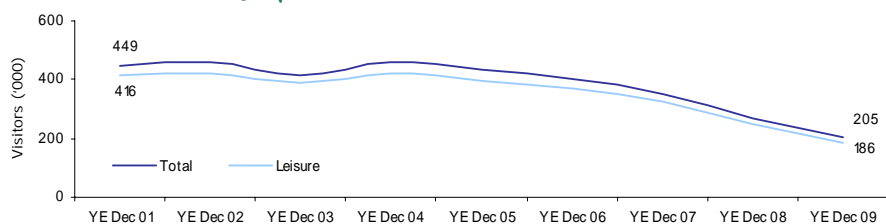
Japan is Australia's fifth largest international market, and declined over the year ended December 2009.

Over half of the Japanese visitors to Australia were first time visitors (54%).

Almost one third (35%) of visitors from Japan travelled unaccompanied, while 27% travelled as an adult couple.

Most Japanese visitors to Australia travelled on a package (52%). This market has declined by 33% over the year to December 2009.

### Japanese visitors to Queensland



### Japanese visitors to Queensland

Japan is Queensland's third largest international market, and declined over the year ending December 2009.

Queensland's most visited regions by Japanese visitors were the Gold Coast and TNQ (57% and 43% made a stopover respectively). Japanese visitors to the Gold Coast increased by 8% over the year to December 2009 with air capacity expansion assisting this growth. However, Japanese visitors to TNQ declined (down 45%).

Japanese spent \$371 million on their trips to Queensland in the year to December 2009. This was a decline of 19% on the previous year.

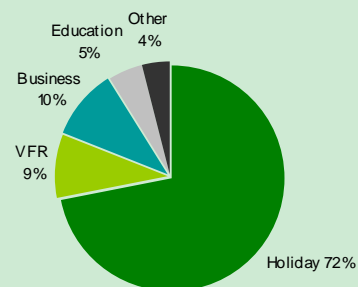
Japanese spend per visitor in Queensland was \$1,809. This is lower than the average spend of all international visitors to Queensland (\$1,973).

### Main purpose of visitation to Australia

The decrease in the number of Japanese visitors to Australia was driven by a decline in the holiday market in the year to December 2009.

The holiday market accounted for almost three quarters of all Japanese visitors to Australia.

However, the VFR (visiting friends or relatives) market increased by 19%.

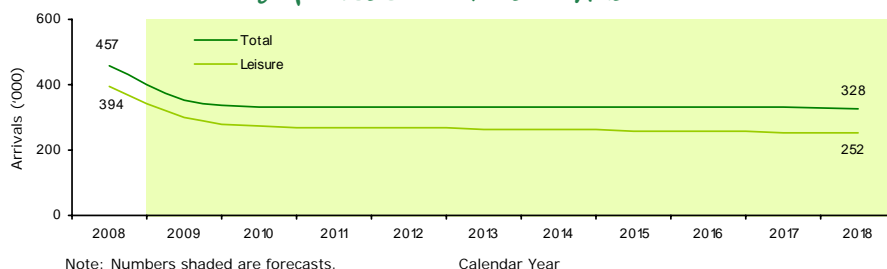


### Japanese arrivals forecast<sup>4</sup>

Japanese arrivals to Australia are forecast to decline by an average of 3% each year from 2008 to reach 328,000 arrivals in 2018.

Please note that arrivals forecast are based on total visitor arrivals into Australia, and therefore may vary from the visitation figures provided in the table above (as visitors are defined as persons over the age of 15, who are visiting Australia for 12 months or less).

### Japanese arrivals to Australia



Note: Numbers shaded are forecasts.

Calendar Year

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 2009 Issue 2

Note: All data unless specified is from Tourism Research Australia, International Visitor Survey year ended December 2009