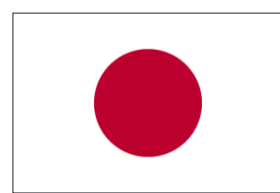


Unpacking the Japanese Traveller



Visitation from Japan to Queensland has grown strongly with expenditure up 14.1% and visitation up 9.2% in the three years ending June 2017.

Current Visitation and Expenditure in Queensland¹



\$430.3M spend
+18.2% YOY



202,000 visitors
+8.8% YOY



89% of trips
are for leisure

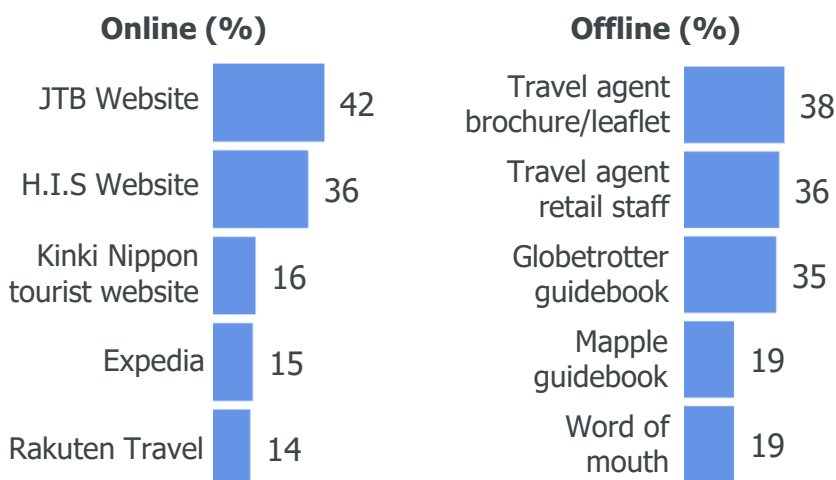
Top five Information Sources for Queensland Leisure Travel²

Japanese travellers use online and offline information sources at similar levels when searching for information about Queensland (83% and 84% respectively). Those in their 20's tend to use a greater number of information sources than those in their 50+ years. Highlighted below are the key information sources used by travellers:

Channels travellers used for planning Queensland trip (%)



Specific channels used:



Research Background

In June/July 2017 Tourism and Events Queensland (TEQ) conducted research in the Japan market to better understand Japanese travellers. The survey was focused on potential growth audiences in Japan, those aged between 20 and 30 years, and those aged 50-64 years. Respondents had to have travelled out of region for leisure purposes in the past five years. Travellers who only purchase full package tour holidays were excluded from this research in order to gain deeper insights into free and independent travellers (FIT) and part package travellers. A total of n=1,111 online surveys were completed.

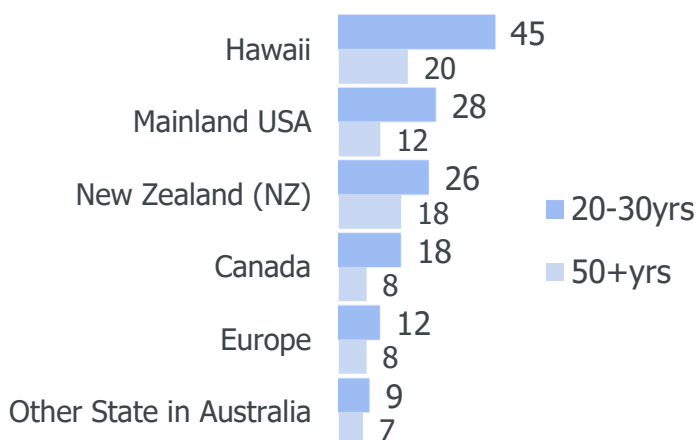
Sources: ¹Tourism Research Australia, International Visitor Survey year ending June 2017
² Japan Market Research 2017, Tourism and Events Queensland

Unpacking the Japanese Traveller

Influential factors in choosing QLD...

1. Natural Landscapes
2. Beaches
3. Culture
4. Food & Beverage
5. Diving & Snorkelling

Competing destinations considered when choosing Queensland (%)



Factors compared against Queensland

Hawaii, Mainland USA and NZ are the destinations most compared against Queensland, with culture and nature key areas of comparison:

Top factors compared against QLD (Ranking)	Hawaii	NZ	Mainland USA
Culture	1	2	1=
Nature	2	1	1=
Beaches	3	3	4
Accommodation	4	4	3

Awareness of Queensland

55% 20-30yrs **69%** 50+yrs

Barriers to visitation

- #1 Price of airfare/accommodation and travelling around
- #2 Unsure of attractions/experiences available
- #3 Food isn't appealing

87% who have previously visited Queensland intend to re-visit in the future



When compared to competing destinations....



51% enjoyed Queensland's unique experiences better

42% found Queenslanders kind and easy to talk to

