

Japan International Market Factsheet

Marketing Overview

The Japanese visitor market is an important visitor market for the Northern Territory in terms of volume and spend. In 2019 the NT held a 8.5% market share of all Japanese holiday visitors to Australia, many of whom visit Uluru as part of a larger Australian itinerary. Uluru was the second most desirable Australian destination for Japanese travellers, however a key motivating factor for visitation was the Uluru climb which closed on 26 October 2019.

The *Northern Territory's Tourism Industry Strategy 2030* sets out a 2030 target for the Japanese market of 50,000 holiday visitors. This equates to a 1.1% compound average annual growth rate from the base (YE March 2019), which takes into account the likely immediate drop-off in demand post-climb closure.

Even though Uluru is the main drawcard for Japanese visitors to the Northern Territory, Tourism NT is committed to dispersing Japanese travellers to Kings Canyon, Alice Springs and the Top End, including Darwin and surrounds, Kakadu and Katherine.

The Japanese market is a mature market and visitors are interested in new Australian destinations. From those Japanese visitors that have visited the Top End we know there is great destination appeal, and this is an opportunity that Tourism NT is focused on working with trade and industry to materialise.

Japan remains a very traditional market for booking style, with greater than 50% of travel bookings from Japan to Australia made through travel agents. Therefore, working with the travel trade in Japan is a key focus of Tourism NT's activity.

Target Market Profile

1. High Value Travellers (HVT) (aged 40-69 years).
2. Women (aged 25-50 years).

ALL PURPOSE	JAPAN	
	2019	YOY CHANGE
VISITORS	39,000	+12%
NIGHTS	130,000	-24%
EXPENDITURE	\$44.1M	+3.5%
ALOS* (nights)	3.3	-1.6
ASPT (average spend per trip)	\$1,129	-\$96
VISITOR MARKET SHARE	8.5%	+0.5pp

*average length of stay

Strategic Opportunities

Consumer-facing campaigns to generate interest and demand	Protecting market share in a steadily growing outbound travel market	Growing the number of well dispersing, long staying and high spending visitors	Strengthening cooperation with trade partners	Training agents to increase their destination and product knowledge
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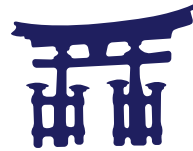
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Market Profile

ANNUAL LEAVE



**UP TO
4 WEEKS**



TARGET REGIONS

- Greater Tokyo
- Osaka
- Nagoya
- Fukuoka
- Sapporo

DRIVERS OF DESTINATION CHOICE



- Food and wine
- A safe and secure destination
- World class nature and wildlife
- Value for money
- History and heritage

SEASONALITY



RELEVANT PRIORITY SECTORS

- Aboriginal tourism
- Education tourism
- Food and drink
- Honeymoon
- History and heritage

SECONDARY SECTORS

- Drive
- Fishing
- Cruise
- Birding
- Hiking
- 4WDing
- Youth

TRAVEL PARTY

38%

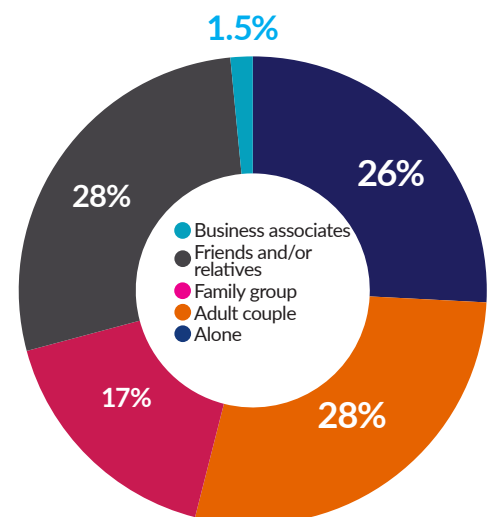
of Japanese all-purpose visitors were Free Independent Travellers (FIT)

54%

of Japanese visitors were travelling alone or as an adult couple

54%

of the visitor nights were in hotel/ motel style accommodation while **31%** were at a rented house, apartment, flat or unit



AVIATION



INTERNATIONAL AIRLINE ACCESS



JAPAN AIRLINES



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CHEAPEST RETURN AIRFARES*

TOKYO - DARWIN (1 STOP)

\$1,936

* Expedia - depart 1/12/19 and return 1/01/20

TOKYO - ULURU (1 STOP)

\$3,210

* Expedia - depart 1/12/19 and return 1/01/20

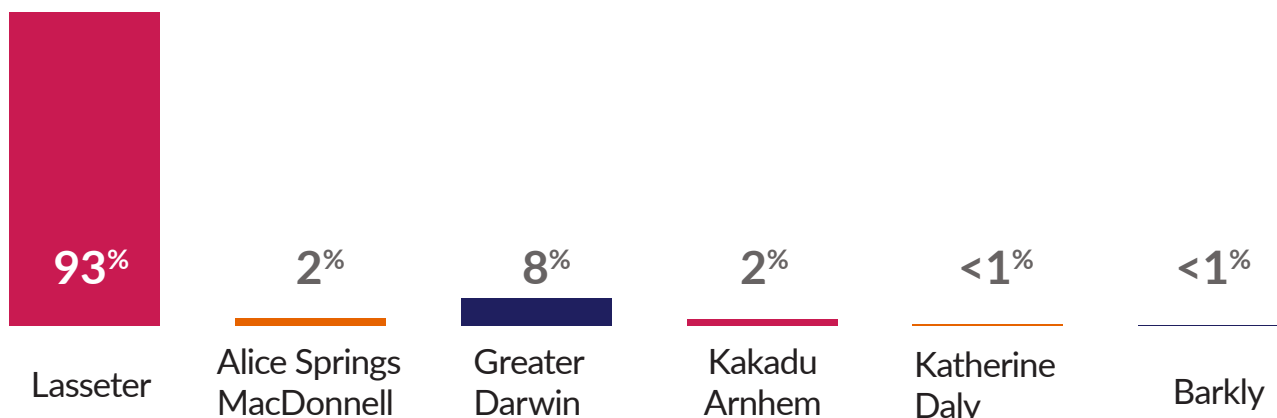
Distribution

- Hankyu Travel International
- H.I.S. Co Ltd
- JALPAK Co Ltd
- JTB
- Kinki Nippon Tourist Co Ltd
- Nippon Travel Agency
- Club Tourism International
- ANA Sales

Major Online Travel Agents

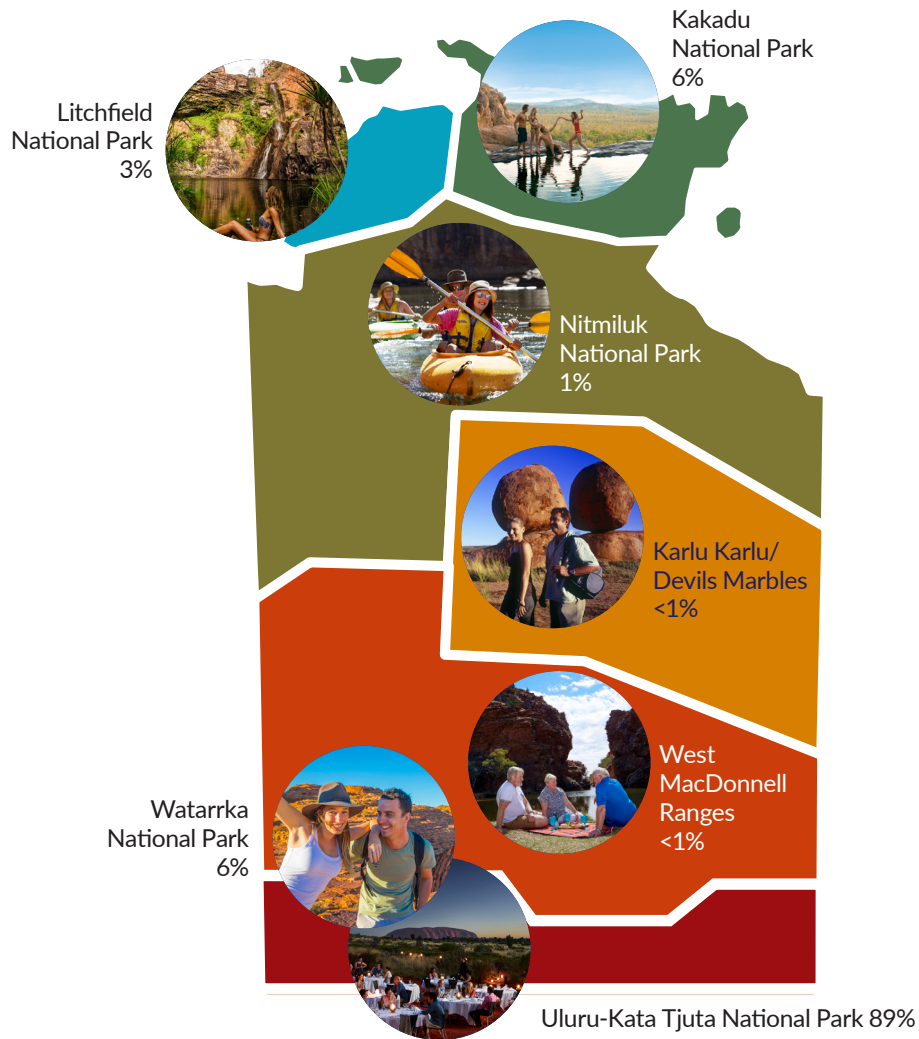


Overnight visitors to NT regions



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Visitors to NT destinations - overnight and day trips



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