

# Consumption Trend Survey for Foreigners Visiting Japan

## 【Topics】

### Detailed Analysis of ASEAN 6

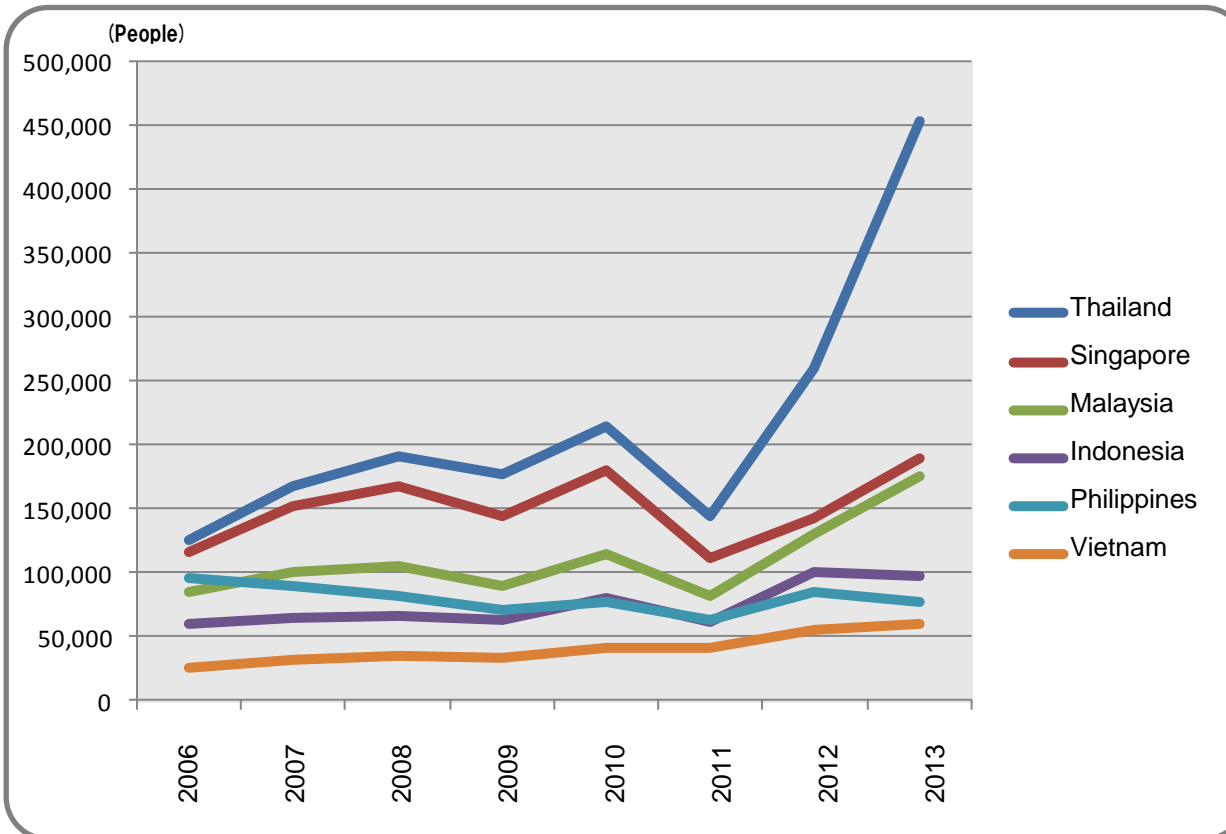
**March 26, 2014**

**Japan Tourism Agency**

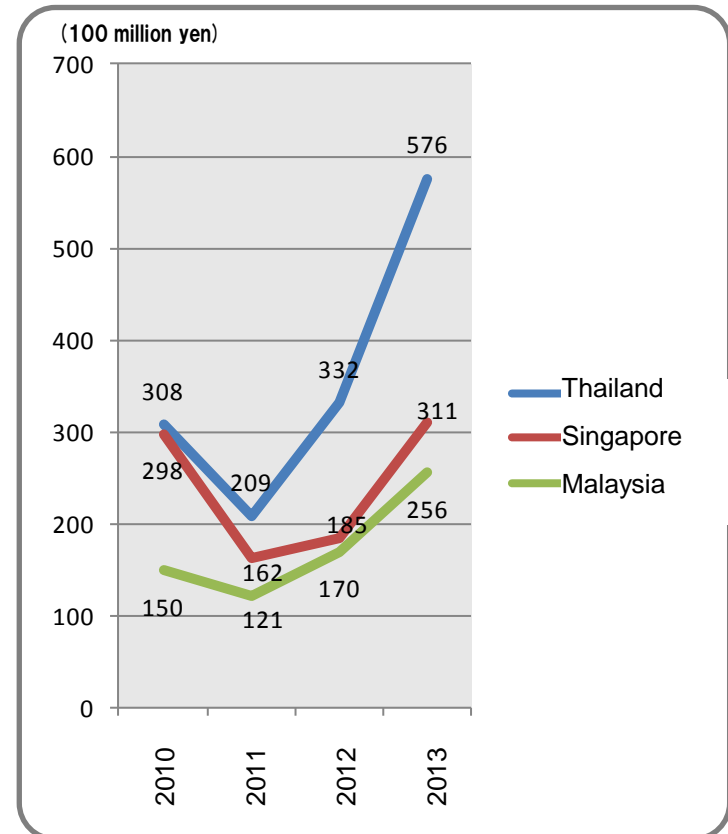
# 【Foreign visitors】 Over 1 million foreign visitors to Japan from the ASEAN 6 is reached in a year with a rapid increase in those from Thailand

- The number of foreign visitors to Japan has reached over 10 million for the first time in 2013. The number of foreign visitors to Japan from ASEAN 6 (Thailand, Singapore, Malaysia, Indonesia, Philippines and Vietnam) have reached over 1 million. Especially visitors from Thailand shows a rapid increase among ASEAN 6 by twice compared to 2010, before the Great East Japan Earthquake and by 74% from the previous year. 【Table 1】
- The total trip expenditure of three countries including Thailand, Singapore and Malaysia <sup>Note 1</sup> has been rising since 2011. 【Table 2】
- In this topic analysis, customer segments and shopping trends of the ASEAN 6 visitors in 2013 will be analyzed in detail.

**Table 1 Changes in the number of foreign visitors to Japan from ASEAN 6 <sup>Note1</sup>**



**Table 2 Trip expenditure of ASEAN 3 countries <sup>Note2</sup>**



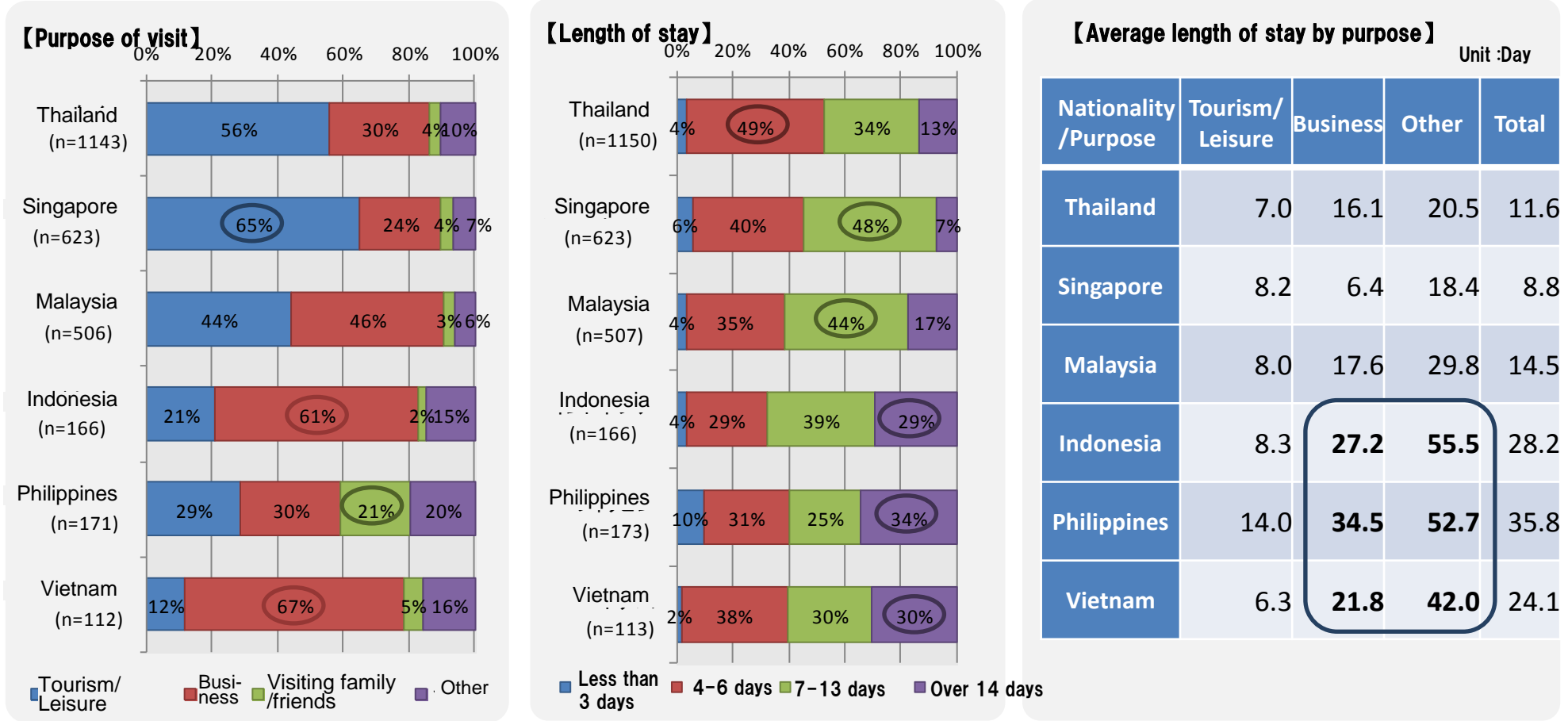
(Note 1) The number of foreign visitors to Japan from January to October are provisional values and from November to December are estimated figures for 2013. Source: Japan National Tourism Organization (JNTO)

(Note2) The trip expenditure covers the domestic revenue of the package tour cost including accommodation and international travelers' fare. The figures for 2013 are preliminary.

# 【Visitor segment】 Regarding visiting family and friends, visitors from the Philippines is relatively higher

- Singapore ranks high in “tourism/leisure” for visiting purposes. Vietnam and Indonesia rank high in “business” with nearly 70% and 60%, respectively. In the Philippines, over 20% of the visitors are for “visiting family/friends”, which is higher than other countries. 【Table 3】
- For the length of stay, most visitors from Thailand stay “4-6 days”, and visitors from Singapore and Malaysia stay “7-13 days”. There is a high percentage of visitors from Indonesia, Philippines and Vietnam for the purpose of “business” or “visiting family/friends” with long average stay lengths of “over 14 days”. 【Table 3】

**Table 3 Visitor segment of the foreign visitors to Japan from ASEAN 6**

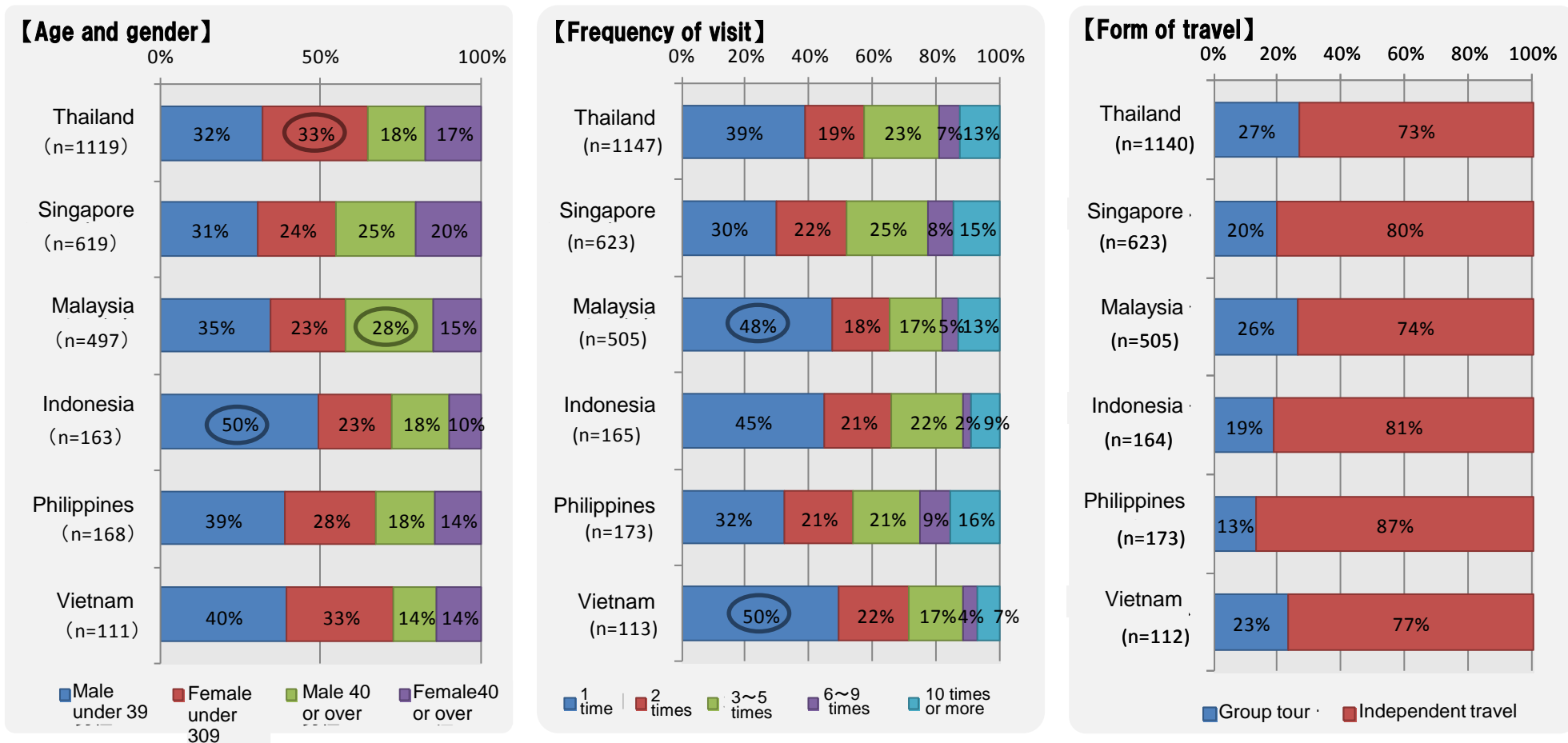


(Note1) All the above numbers are obtained by simple calculation of responses of the January-March, April-June, July-September, and October-December quarters in 2013. (Sampling is not weighted based on the number of foreign tourists to Japan.)

# 【Visitor segment】 Nearly a half of the visitors from Malaysia and Vietnam are first-time visitors to Japan

- Regarding the distribution of age and gender by nationality, over 30% of the visitors from Thailand are "women under 39", nearly 30% from Malaysia are "males in 40s", and 50% from Indonesia are "males under 39", which is high. 【Table 4】
- For the frequency of visits to Japan, ratio of the "first time" in Malaysia and Vietnam is nearly 50% and is higher than other countries. 【Table 4】

Table 4 Visitor segment of the foreign visitors to Japan from ASEAN 6

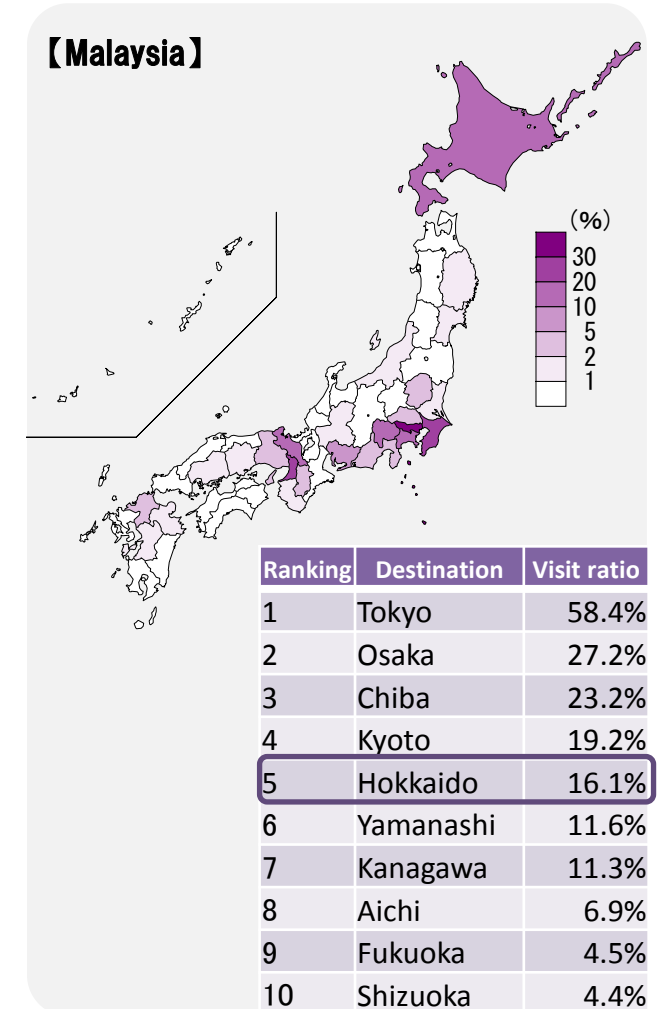
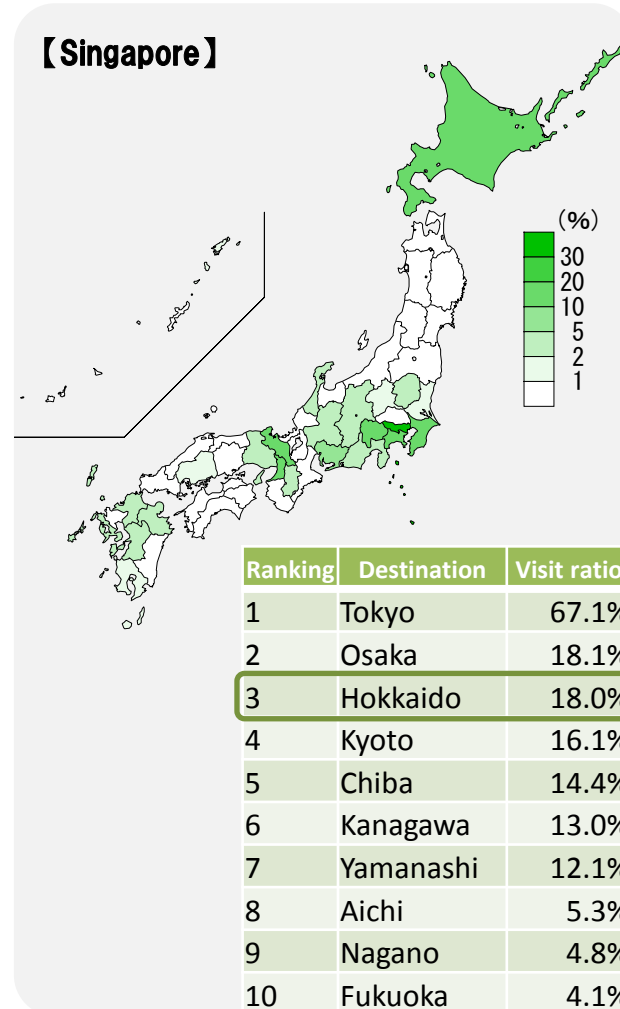
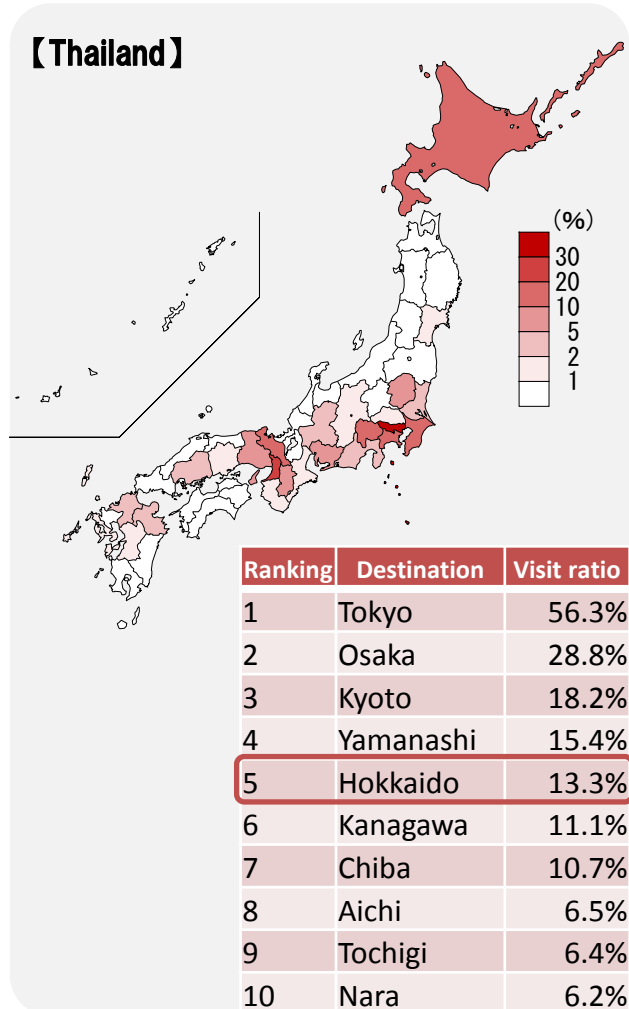


(Note1) All the above numbers are obtained by simple calculation of responses of the January-March, April-June, July-September, and October-December quarters in 2013. (Sampling is not weighted based on the number of foreign tourists to Japan.)

# 【Destination】Hokkaido is popular among visitors from Thailand, Singapore and Malaysia

- Comparison of visit ratio by prefecture according to nationality shows that the highest is Tokyo and the next is Osaka among visitors from Thailand, Singapore and Malaysia. In addition, the visit ratio of Hokkaido is high within the top 5 for all countries. 【Table 5】

Table 5 Visit ratio per prefecture

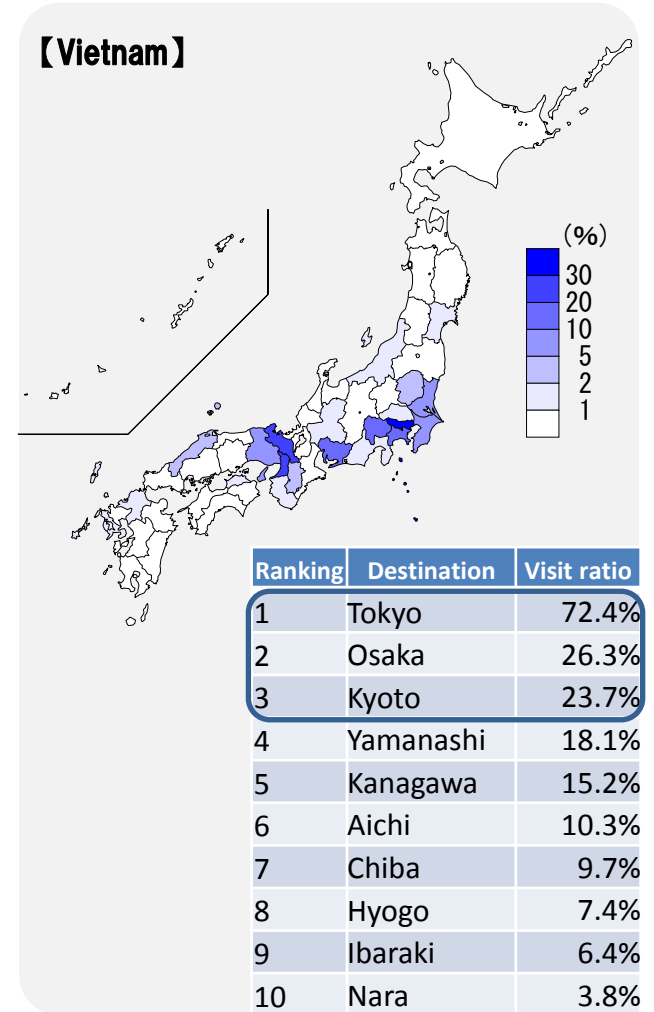
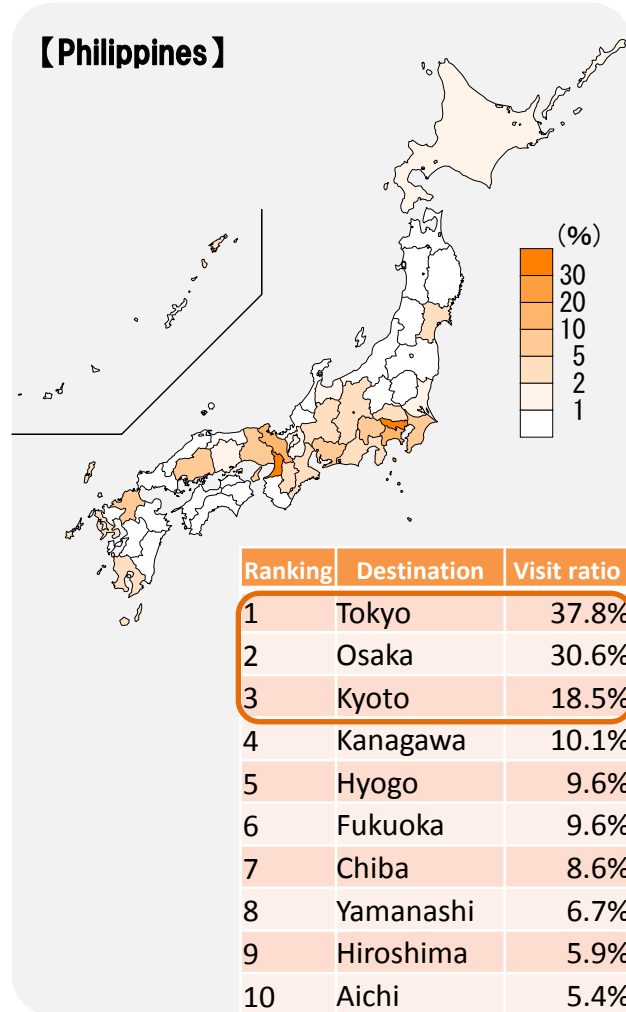
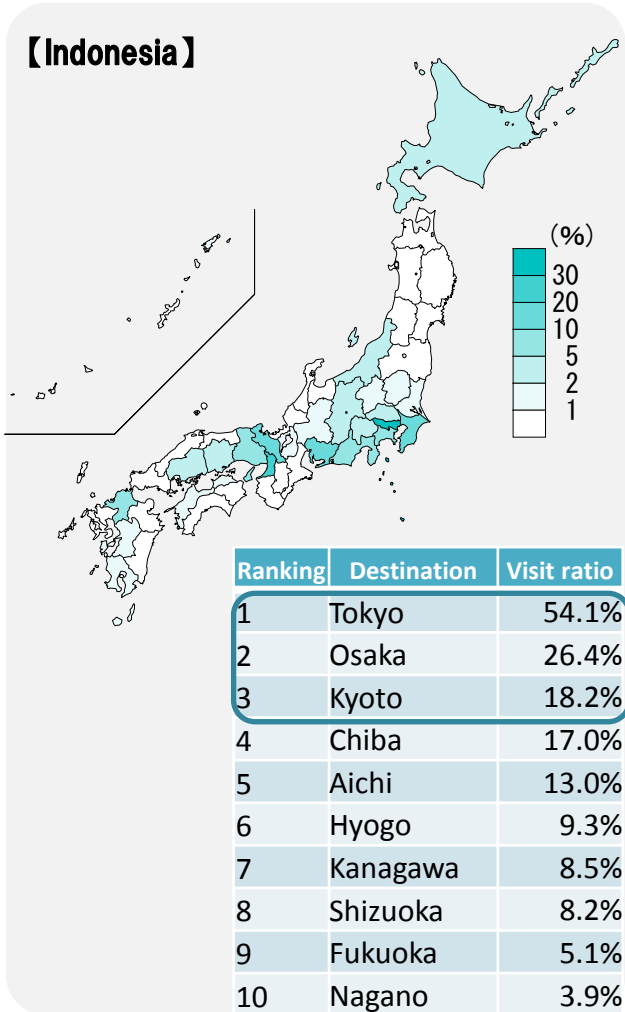


(Note 1) All the above numbers have been weighted based on the number of foreign visitors to Japan. The numbers of foreign visitors to Japan in November and December 2013 are estimated values. Source : Japan National Tourism Organization (JNTO)

# 【Destination】Visitors from Indonesia, Philippines and Vietnam visit Tokyo, Osaka, and Kyoto

- Comparison of visit ratio by prefecture according to nationality shows that Tokyo, Osaka and Kyoto are the top three popular prefectures for visitors from Indonesia, Philippines and Vietnam. 【Table 6】

Table 6 Visit ratio per prefecture



(Note 1) Calculations on this page have been obtained from weighted sampling by the number of foreign visitors to Japan by quarters to the visit ratio per prefecture in April-June, July-September and October-December quarters in 2013. The numbers of foreign visitors to Japan in November and December 2013 are estimated values. Source : Japan National Tourism Organization (JNTO)



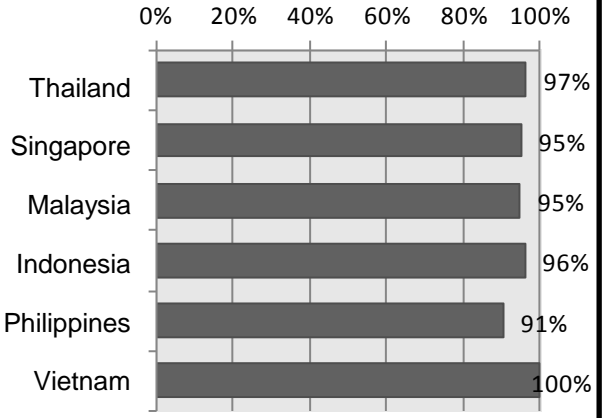
# 【Shopping expenditure】 Shopping expenditure is more by the Vietnamese at 80,000 yen

- Average expenditure per purchaser on shopping is the highest by the Vietnamese at 80,000 yen followed by the Thais (at 62,000 yen). 【Table 7】
- Comparison of purchase rate and average expenditure per purchaser by product according to nationality shows that “Confectioneries” is high in the Thai visitors and “Other food, drink, alcohol & tobacco” is high by the Singaporeans and the Indonesians. 【Table 7】

Table 7 Purchase rate and average expenditure per purchaser

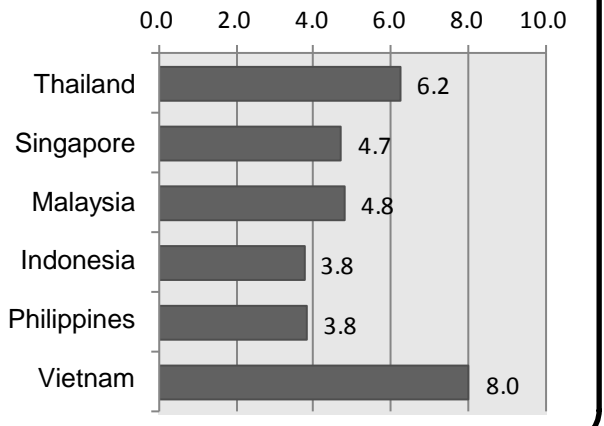
## 【Shopping cost】

### 【Purchase rate】



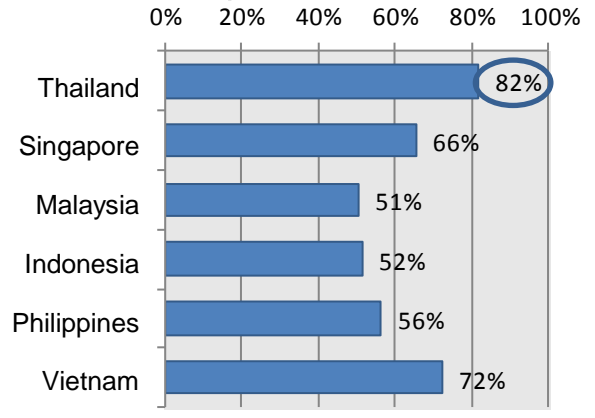
### 【Average expenditure per purchaser】

Unit : 10,000 yen



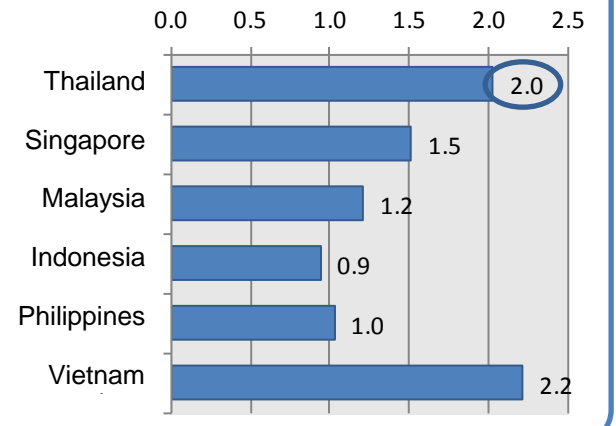
## 【Confectioneries】

### 【Purchase rate by product】



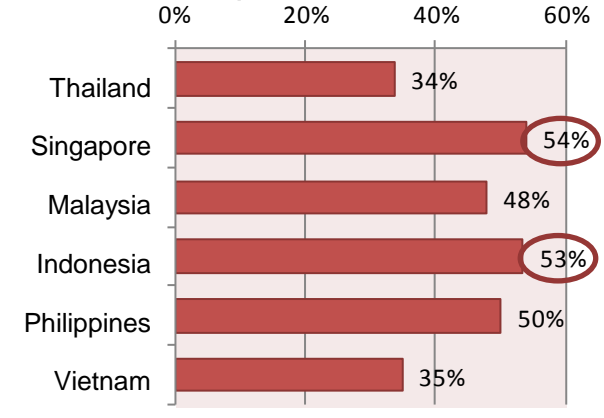
### 【Average expenditure per purchaser】

Unit : 10,000 yen



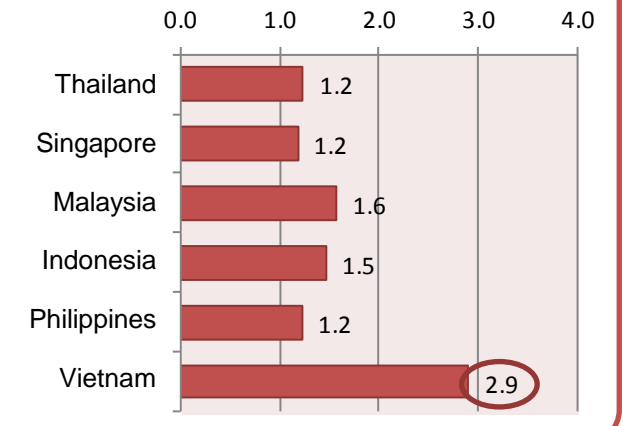
## 【Other food, drink, alcohol & tobacco】

### 【Purchase rate by product】



### 【Average expenditure per purchaser】

Unit : 10,000 yen



(Note1) All the above numbers are obtained by simple calculation of responses of the January–March, April–June, July–September, and October–December quarters in 2013. (Sampling is not weighted based on the number of foreign tourists to Japan.)

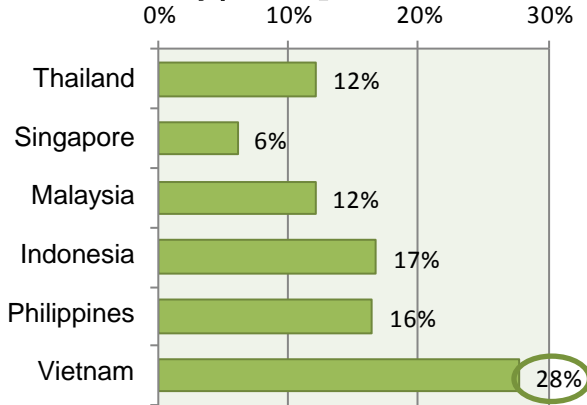
# 【Shopping expenditure】Purchase Rates for cameras, watches, consumer electronics and cosmetics is more by the Vietnamese

- Both purchase rates and average expenditure per purchaser in “cameras, video cameras, watches” and “consumer electronics” are more by the Vietnamese, and average expenditure per purchaser in “cosmetics, medicine, etc.” is more by the Thais and the Vietnamese. 【Table 8】

Table 8 Purchase rate and average expenditure per purchaser

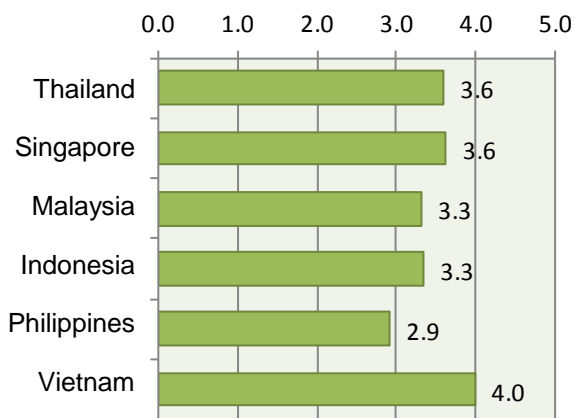
## 【Cameras, video cameras, watches】

### 【Purchase rate by product】



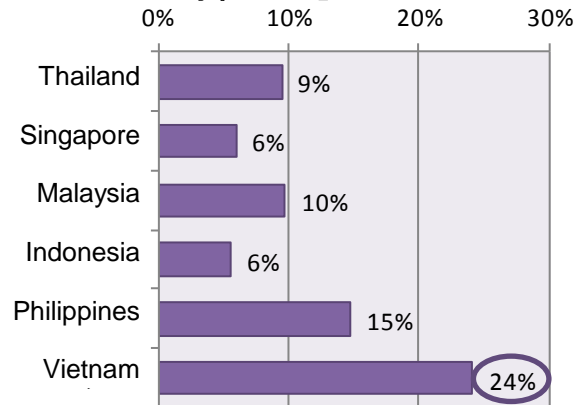
### 【Average expenditure per purchaser】

Unit : 10,000 yen



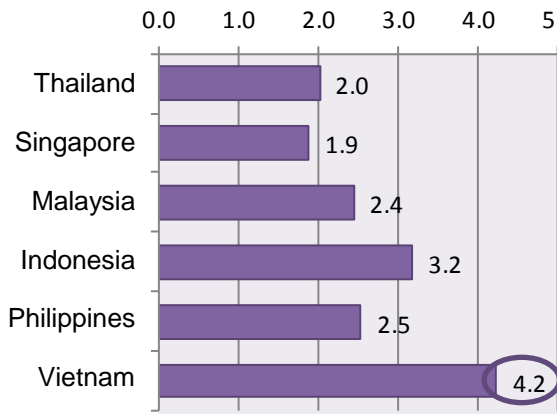
## 【Consumer electronics】

### 【Purchase rate by product】



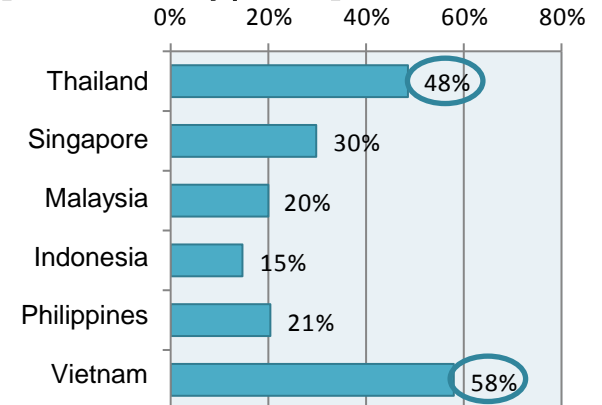
### 【Average expenditure per purchaser】

Unit : 10,000 yen



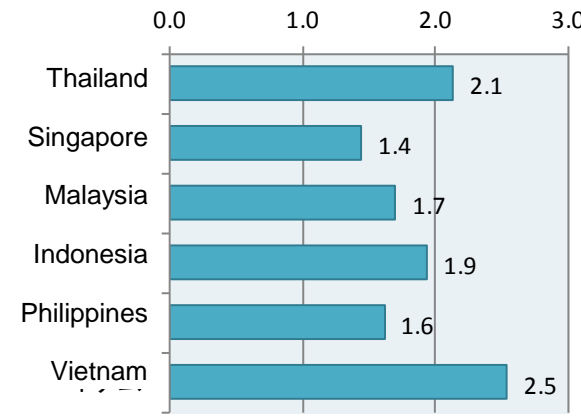
## 【Cosmetics, medicine, toiletries】

### 【Purchase rate by product】



### 【Average expenditure per purchaser】

Unit : 10,000 yen



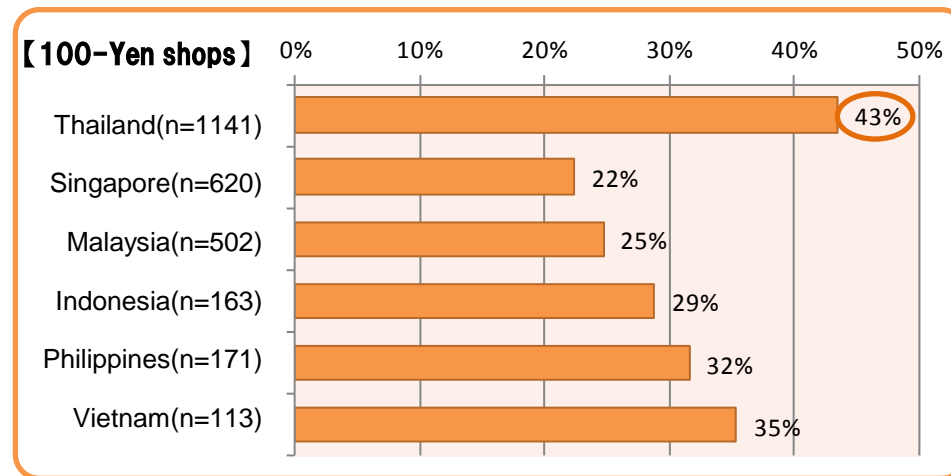
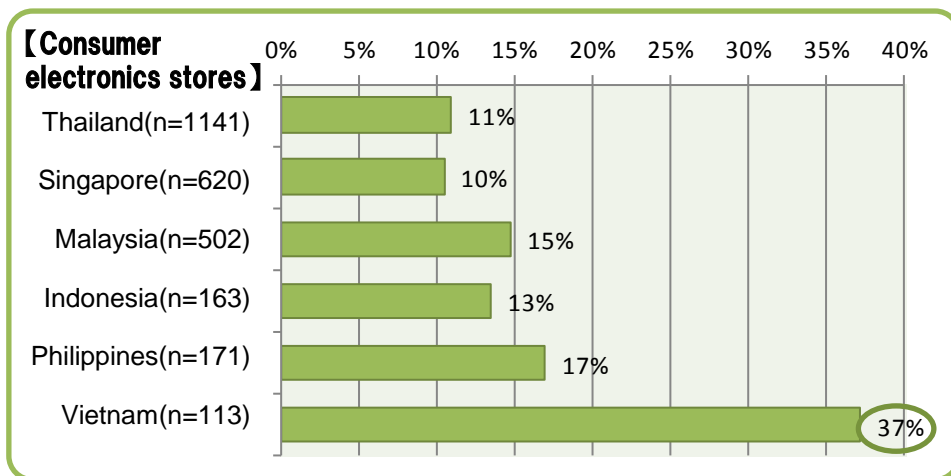
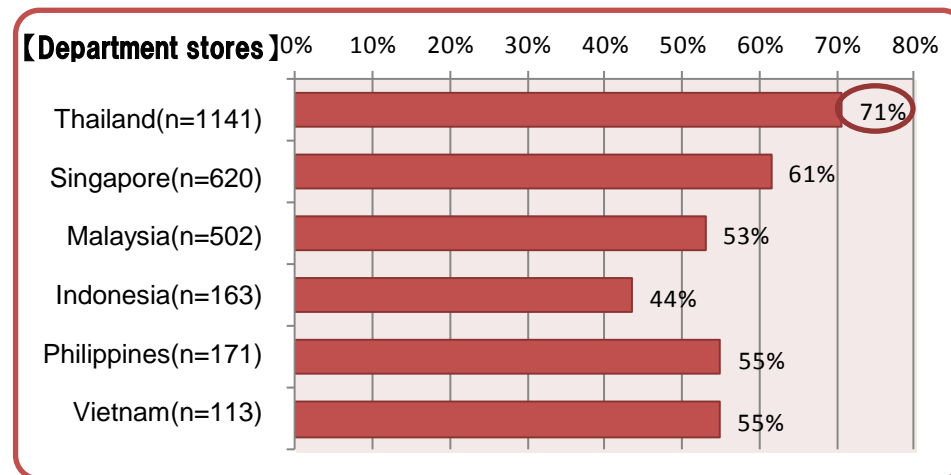
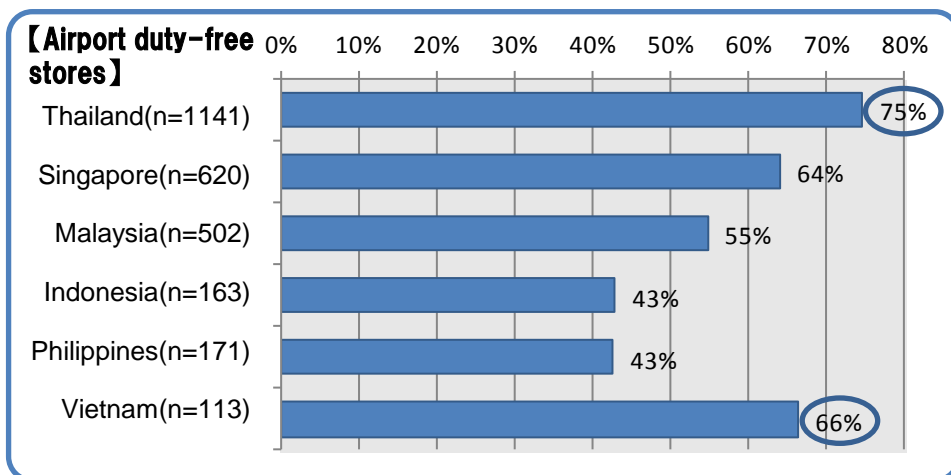
(Note1) All the above numbers are obtained by simple calculation of responses of the January–March, April–June, July–September, and October–December quarters in 2013. (Sampling is not weighted based on the number of foreign tourists to Japan)



# 【Shopping locations】 Shopping location is diverse for the Thais, many Vietnamese shop at consumer electronics stores

- Comparison of shopping locations by nationality shows that there is a high utilization ratio of "airport duty-free stores", "department stores" and "100-Yen shops" by the Thais. The usage rate of "consumer electronics stores" is 37% for the Vietnamese, which is higher than other ASEAN countries. 【Table 9】

**Table 9 Usage rate by shopping location (multiple answers)**



(Note1) All the above numbers are obtained by simple calculation of responses of the January-March, April-June, July-September, and October-December quarters in 2013. (Sampling is not weighted based on the number of foreign tourists to Japan.)

# 【Activity contents】 Experience rates of Eating Japanese food and shopping are high

- The most popular activity in a trip is to "eat Japanese food" and "shop". In addition, a comparison of the activities experienced during the stay in Japan and activities that they want to do next time shows that the ranking for "nature/scenery sightseeing" is rising. 【Table 10】

Table 10 Activities experienced during the stay in Japan and activities that they want to do next time (multiple answers)

Thailand		This trip's experience	Ratio	Want to do next time	Ratio	Ranking change
	1	Eat Japanese food	99%	Eat Japanese food	54%	→
	2	Shopping	79%	Shopping	50%	→
	3	Walking in shopping districts	61%	Nature/scenery sightseeing	41%	→
	4	Nature/scenery sightseeing	53%	Seasons (cherry blossoms, autumn leaves, winter etc.)	36%	→
	5	Bathe in a hot spring	26%	Bathe in a hot spring	35%	→

Singapore		This trip's experience	Ratio	Want to do next time	Ratio	Rank change
	1	Eat Japanese food	98%	Nature/scenery sightseeing	45%	↗
	2	shopping	83%	Eat Japanese food	44%	↘
	3	Walking in shopping districts	75%	Seasonal attractions	44%	↗
	4	Nature/scenery sightseeing	61%	Bathe in a hot spring	41%	↗
	5	Stay in a Japanese-style inn	46%	Stay in a Japanese-style inn	39%	↗

Malaysia		This trip's experience	Ratio	Want to do next time	Ratio	Rank change
	1	Eat Japanese food	96%	Eat Japanese food	61%	→
	2	shopping	87%	shopping	56%	→
	3	Walking in shopping districts	77%	Nature/scenery sightseeing	44%	→
	4	Nature/scenery sightseeing	58%	Bathe in a hot spring	44%	→
	5	Business	41%	Walking in shopping districts	44%	↘

Indonesia		This trip's experience	Ratio	Want to do next time	Ratio	Rank change
	1	Eat Japanese food	97%	Eat Japanese food	53%	→
	2	shopping	88%	shopping	49%	→
	3	Walking in shopping districts	69%	Nature/scenery sightseeing	46%	↗
	4	Nature/scenery sightseeing	49%	Walking in shopping districts	38%	↘
	5	Business	44%	Business	35%	→

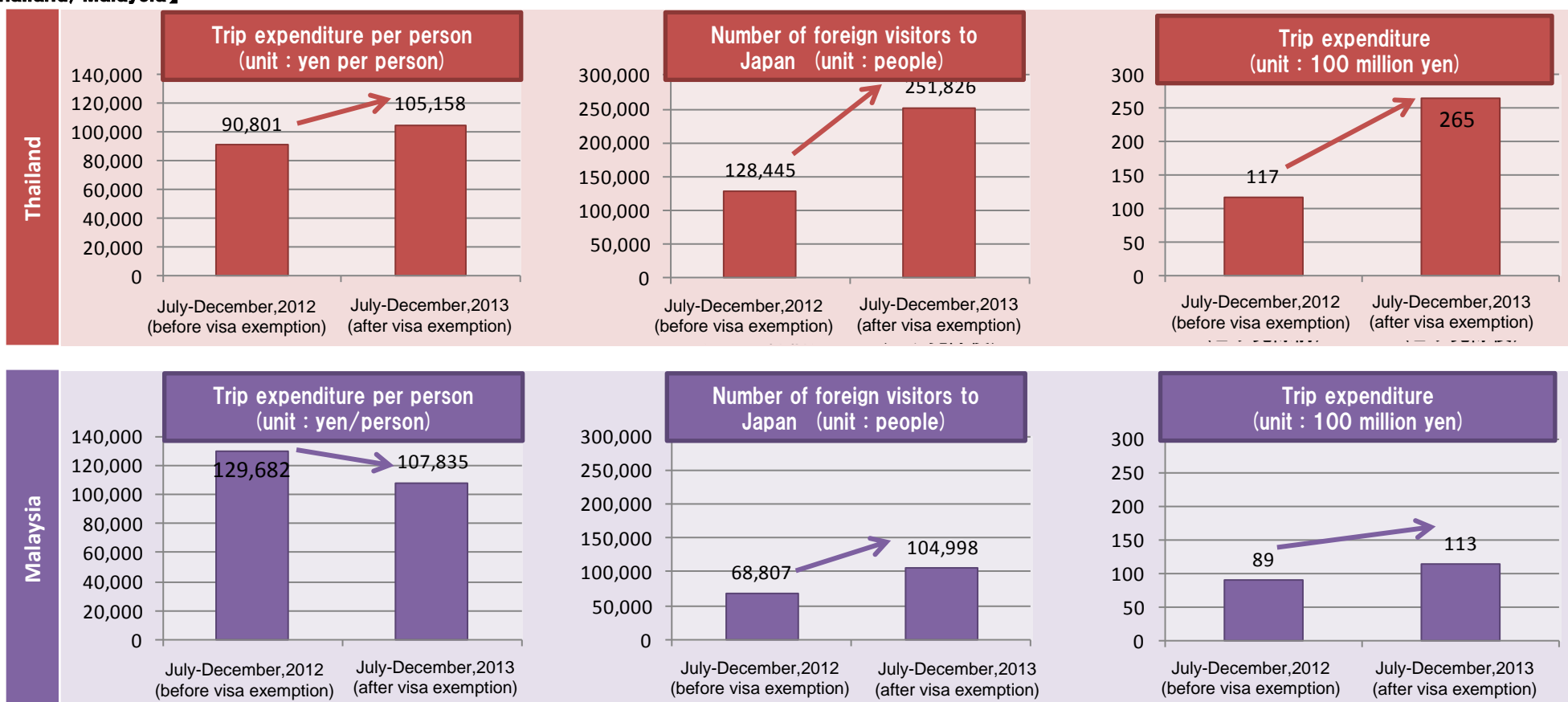
Philippines		This trip's experience	Ratio	Want to do next time	Ratio	Rank change
	1	Eat Japanese food	99%	Eat Japanese food	78%	→
	2	shopping	83%	Nature/scenery sightseeing	67%	↗
	3	Walking in shopping districts	75%	Walking in shopping districts	66%	→
	4	Nature/scenery sightseeing	64%	shopping	65%	↘
	5	Experience life in Japan	48%	Experience life in Japan	56%	→

Vietnam		This trip's experience	Ratio	Want to do next time	Ratio	Rank change
	1	Eat Japanese food	96%	Nature/scenery sightseeing	62%	↗
	2	shopping	89%	Walking in shopping districts	62%	↗
	3	Nature/scenery sightseeing	74%	shopping	62%	↘
	4	Walking in shopping districts	74%	Eat Japanese food	55%	↘
	5	Stay in a Japanese-style inn	48%	Experience life in Japan	52%	↗

# 【Situation after visa exemption】 Both the number of foreign visitors to Japan and expenditure increases from Thailand and Malaysia

- Since July 1st, 2013, Japan relaxed visa requirements for the Southeast Asian countries and visa was exempt for short stays for visitors from Thailand and Malaysia.
- When the quarters between before and after visa exemption (July–December, 2012 and July–December, 2013) are compared, both of the number of foreign visitors to Japan and the expenditures paid per person from Thailand have increased. In visitors from Malaysia, the expenditures paid per person has decreases but consumption increases due to rise in the number of foreign visitors to Japan. 【Table 11】
- Change in the visitor segments between before and after visa exemption from Thailand and Malaysia are analyzed in the following pages.

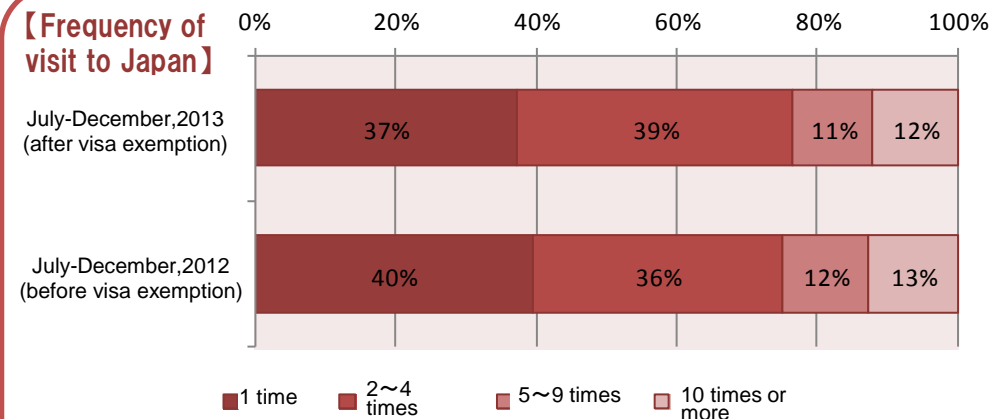
**Table 11 Expenditures paid per person, the number of foreign visitors to Japan, and the trip expenditure between before and after the visa exemption 【Thailand/Malaysia】**



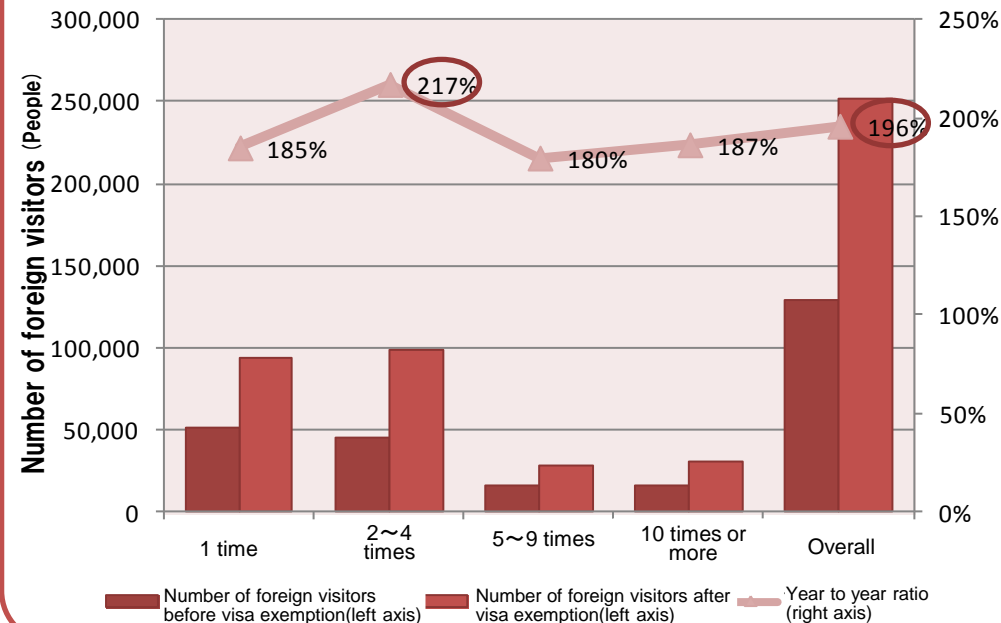
(Note 1) Expenditure is calculated by multiplying "trip expenditure per person" by the "number of foreign visitors to Japan" and excludes domestic revenue included in "expenditure before departure".  
 (Note 2) The number of foreign visitors to Japan from January to October are provisional, and from November to December are estimated for 2013. Source: Japan National Tourism Organization (JNTO)

# 【Situation after visa exemption】 Repeat visitors from Thai who have visited Japan 2-4 times has increased

**Table 12 The number of foreign visitors to Japan by frequency of visit before and after visa exemption【Thailand】**

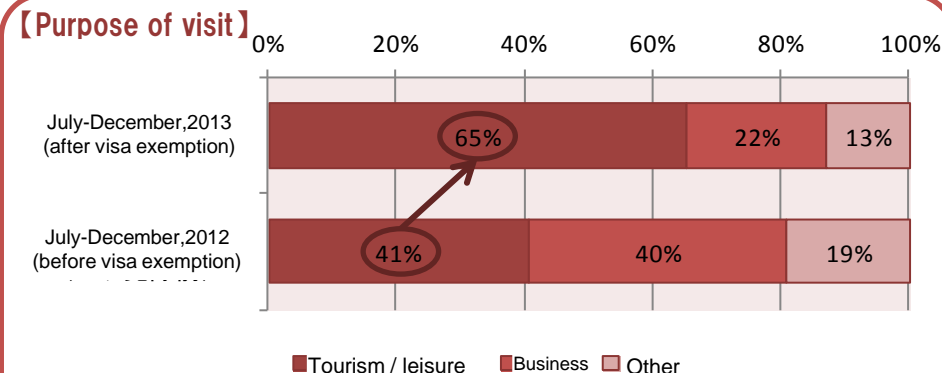


**【Number of foreign visitors to Japan by frequency of visit (actual number and year-on-year rate)】**

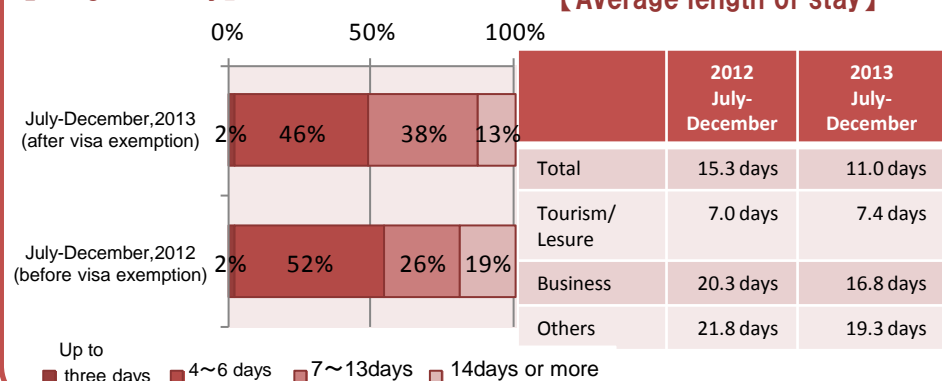


- The number of foreign visitors to Japan by frequency is calculated by multiplying the frequency of visit by the number of foreign visitors, which indicates an increase in the number of people who have visited "2-4 times". 【Table 12】
- For visiting purposes, the ratio of "Tourism/leisure" has increased. For length of stay, the ratio of "over 14 days" has decreased as well as average length of stay. 【Table 13】

**Table 13 Comparison in visitor segments before and after visa exemption【Thailand】**

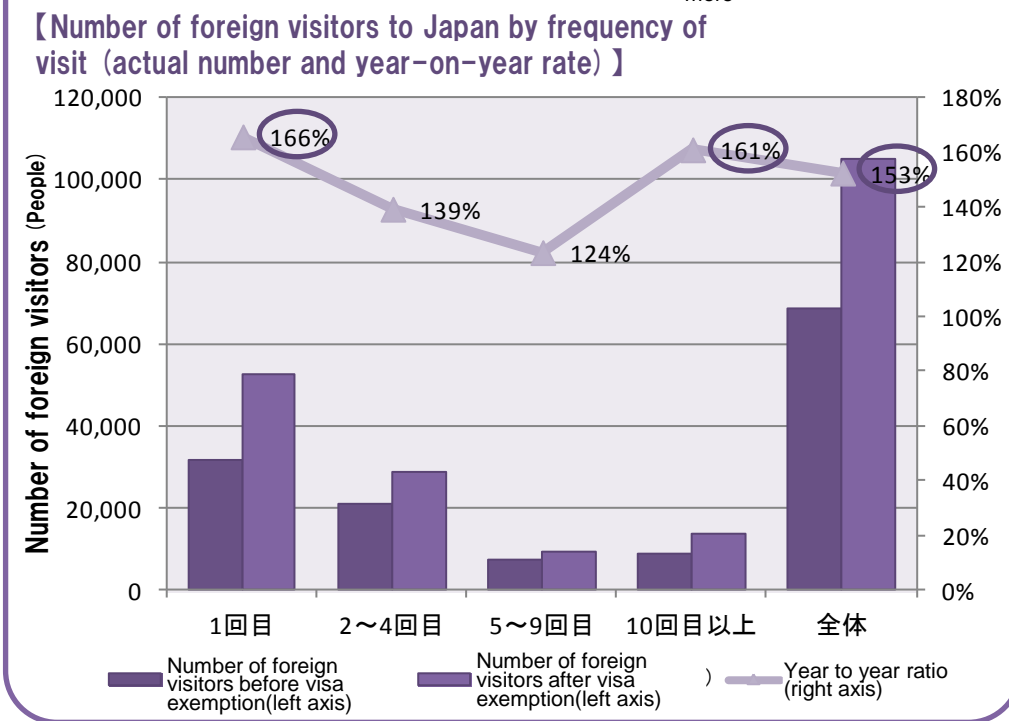
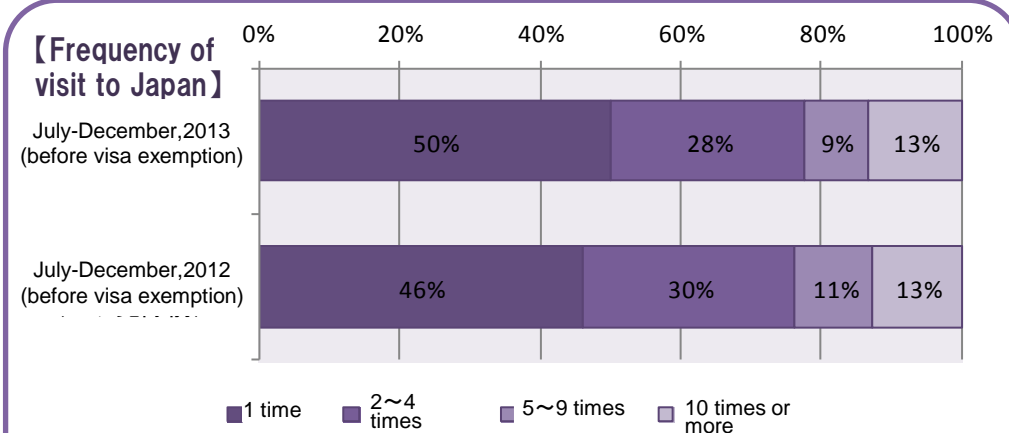


**【Length of stay】**



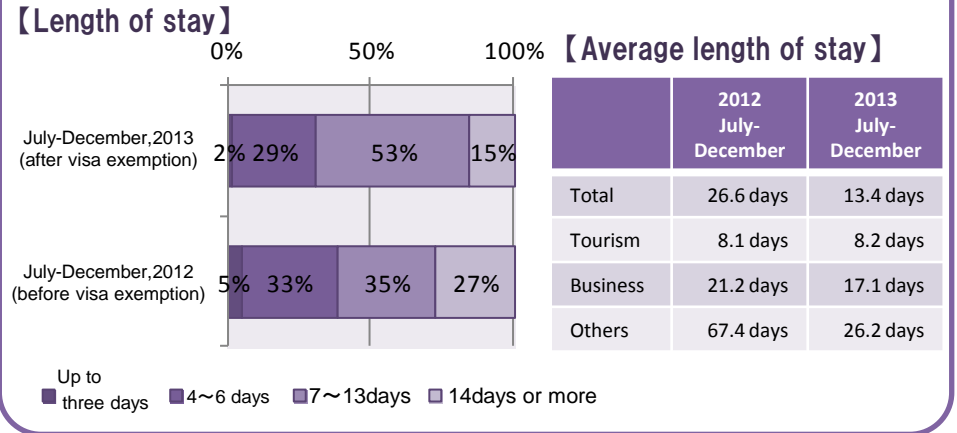
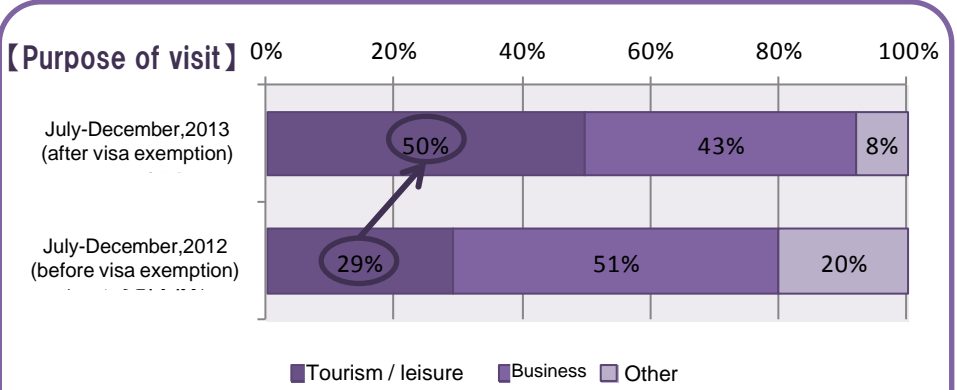
# 【Situation after visa exemption】First-time visitors to Japan from Malaysia have increased

**Table 14 The number of foreign visitors to Japan by frequency of visit before and after visa exemption 【Malaysia】**



- The number of foreign visitors to Japan by frequency of visit is calculated by multiplying the composition ratio by frequency of visit to the number of foreign visitors to Japan, which indicates an increase in the number of people who have visited for the "first-time" and has visited "over 10 times". 【Table 14】
- For visiting purposes, the ratio of "Tourism/leisure" has increased. For length of stay, the ratio of "over 14 days" has decreased as well as average length of stay. 【Table 15】

**Table 15 Comparison of visitor segments before and after visa exemption【Malaysia】**



	2012 July-December	2013 July-December
Total	26.6 days	13.4 days
Tourism	8.1 days	8.2 days
Business	21.2 days	17.1 days
Others	67.4 days	26.2 days

(Note 1) All the above numbers have been weighted based on the number of foreign visitors to Japan. The numbers of foreign visitors to Japan in November and December 2013 are estimated values. Source : Japan National Tourism Organization (JNTO)