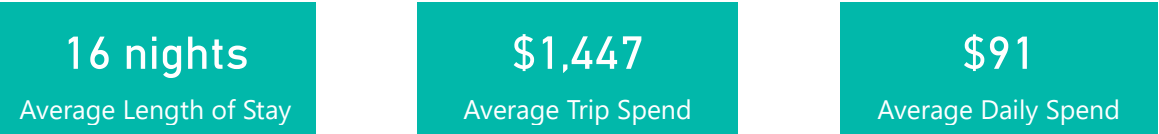


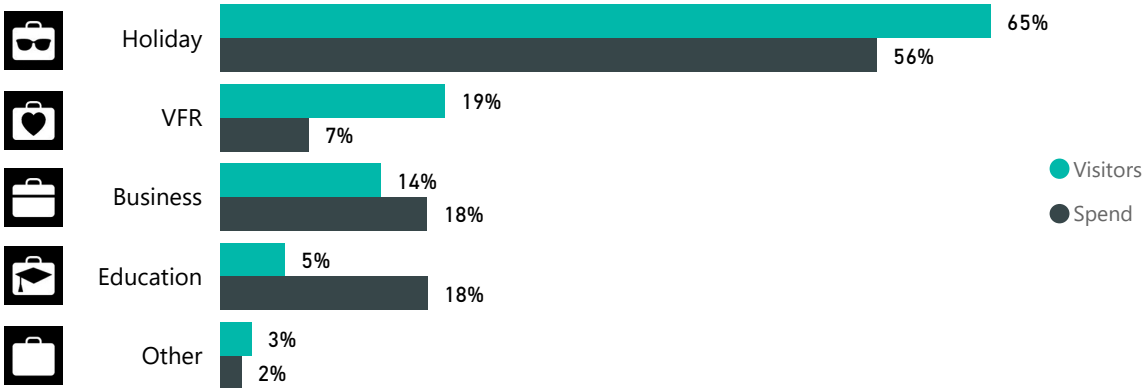
JAPAN | MARKET PROFILE 2022

MARKET OVERVIEW

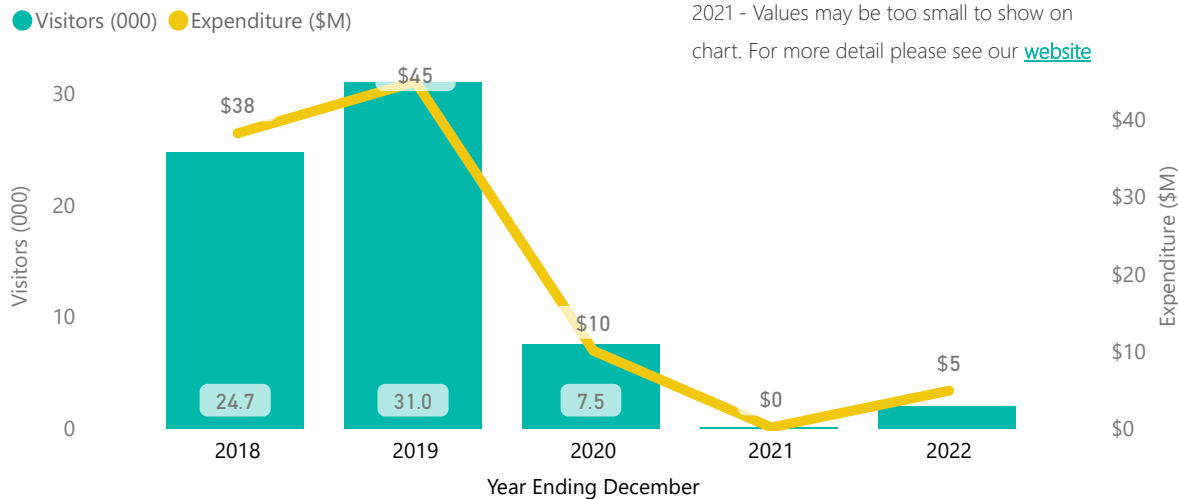
Leisure Visitation to WA¹



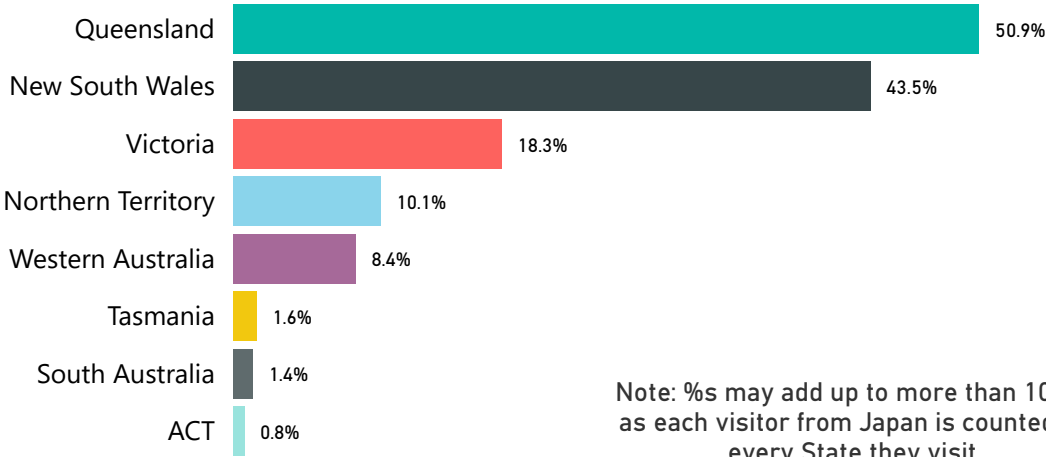
International Visitors and Spend by Purpose (WA)¹



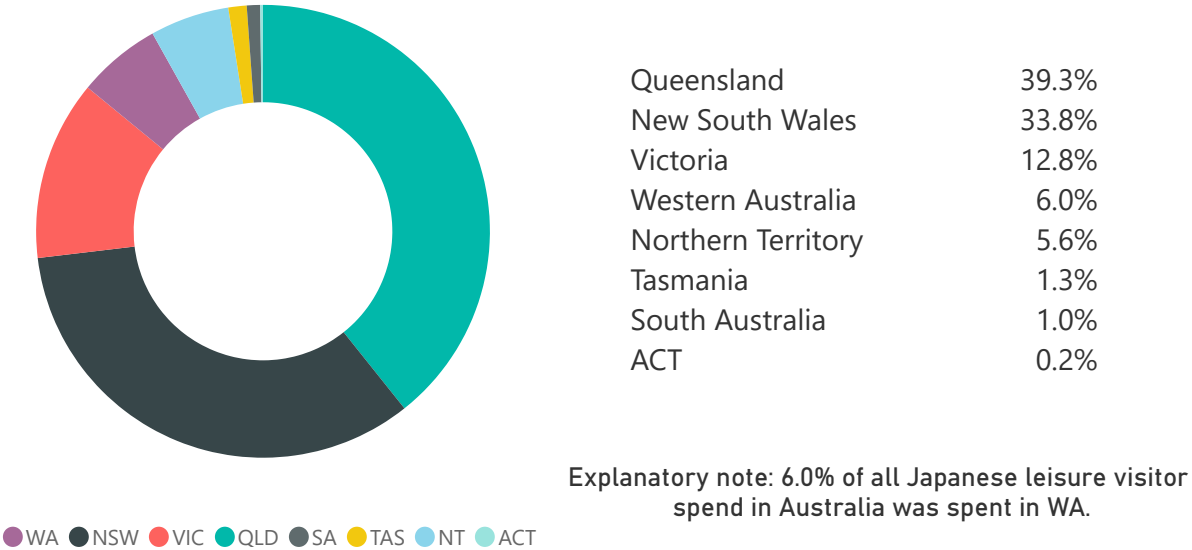
Leisure Visitation and Spend to WA²



Market Share of International Leisure Visitors to Australia¹



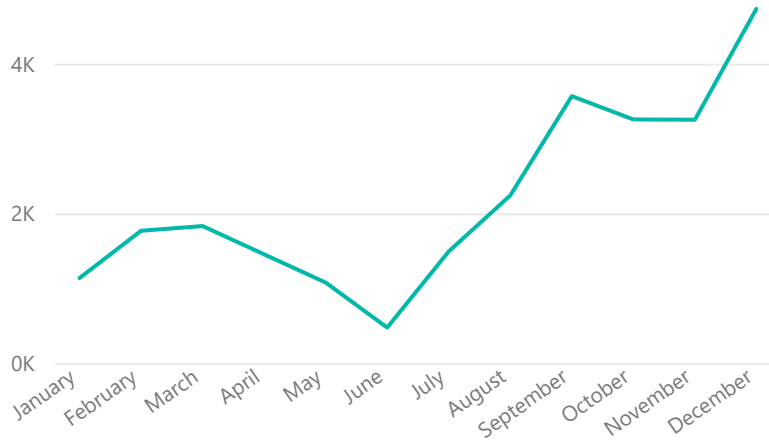
Market Share of International Leisure Visitor Spend in Australia¹



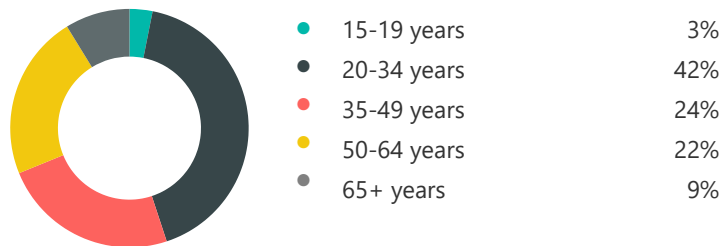
JAPAN | MARKET PROFILE

TRIP PROFILE (THREE YEAR AVERAGE - 2017/18/19)

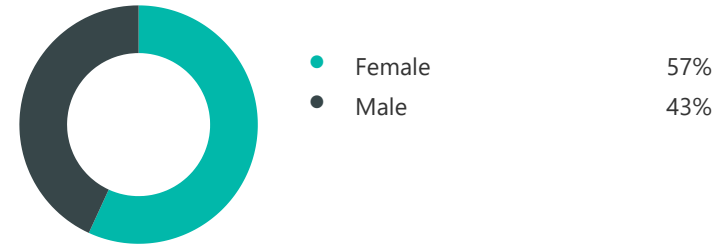
Seasonality - Short-term Leisure Visitor Arrivals to WA⁴



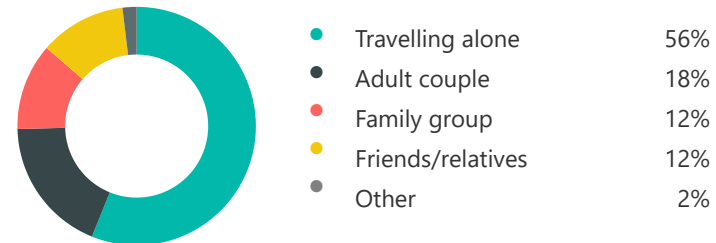
Age³



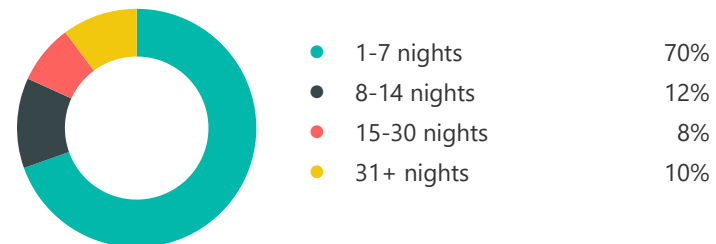
Gender³



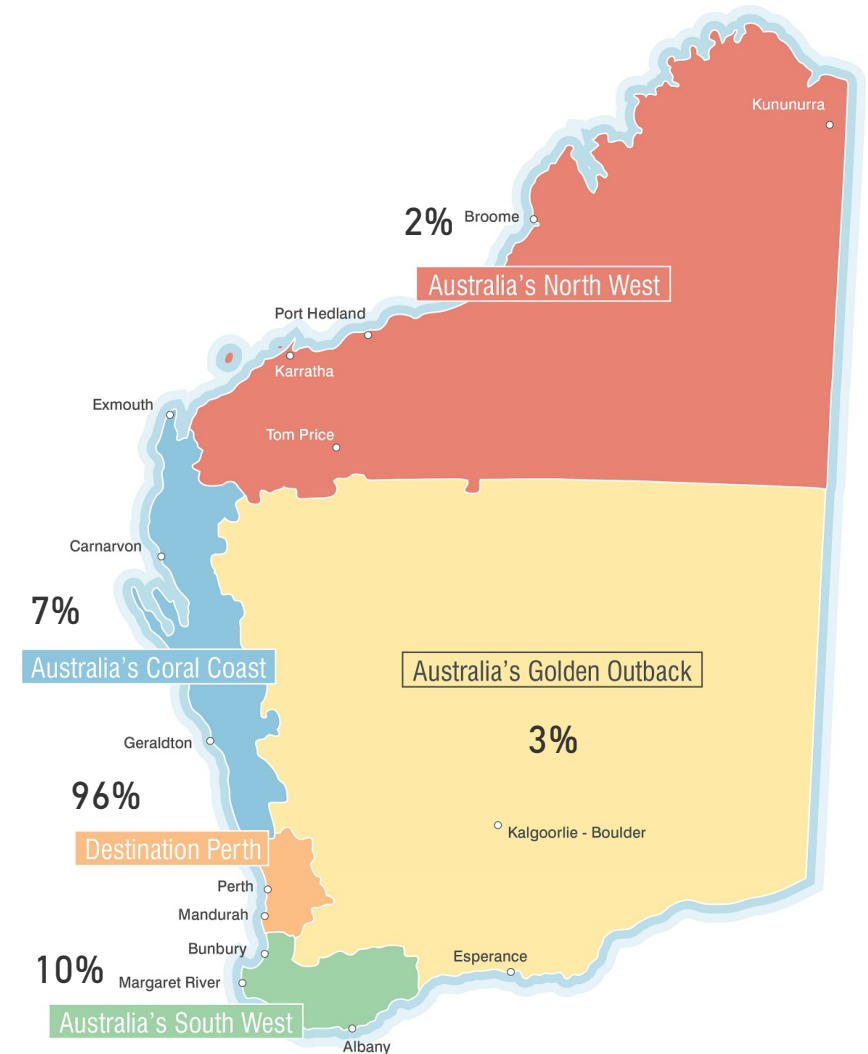
Travel Party³



Length of Trip³



Regional Dispersal³



Note: Due to the small number of international visitors to WA, trip details post 2019 cannot be provided at this time.

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TRIP PROFILE (THREE YEAR AVERAGE - 2017/18/19)

Top 5 Activities for Leisure Visitors to WA³

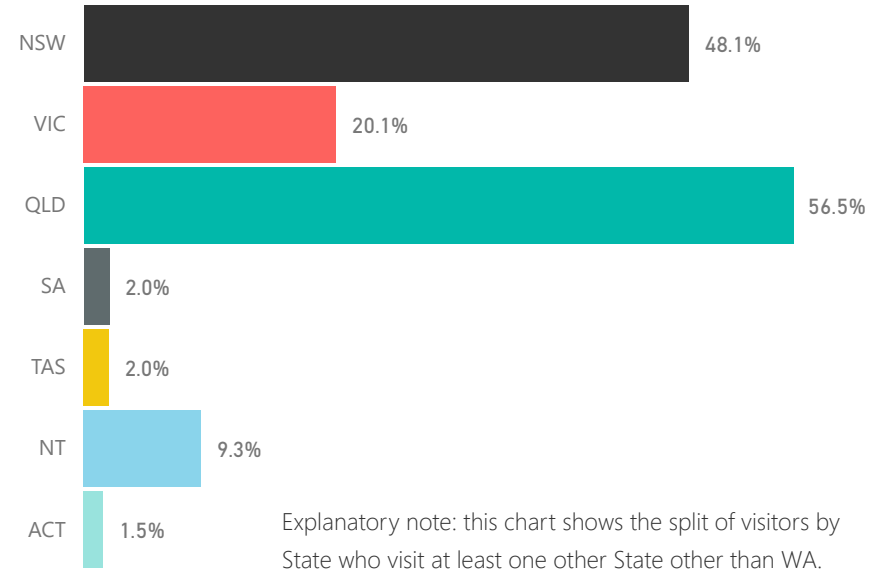
1	Eat out / dine at a restaurant and/or cafe	94%
2	Go shopping for pleasure	87%
3	Go to the beach	62%
4	Sightseeing/looking around	82%
5	Visit national parks / state parks	68%

NOTE: Activity may have taken in place in WA or elsewhere in Australia during the trip.

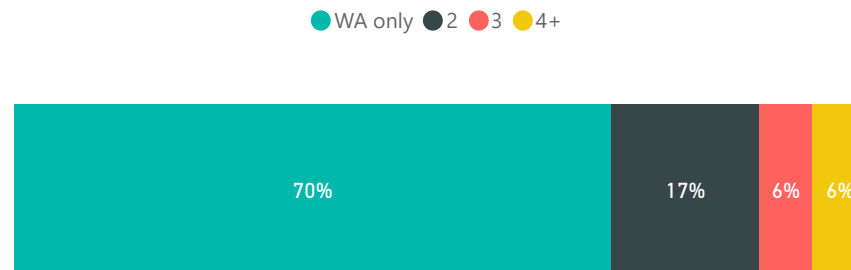
Top 3 Accommodation Choices for Leisure Visitors to WA³

1	Hotel/resort/motel or motor Inn	57%
2	Other Private Accommodation	33%
3	Friends or relatives property	23%

Other States Visited³



Number of States Visited³



Group Tour v Free Independent Travellers (FIT)³

92% of Japanese leisure visitors to WA are free independent travellers. Equally, 91% of Japanese leisure visitors to the rest of Australia are free independent travellers, so only a small proportion are likely to be on a group tour.

Repeat Visitors³

64% of Japanese leisure visitors to WA are on a return visit to Australia

Travel Packages³

19% of Japanese leisure visitors to WA arrived on a travel package

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MOTIVATIONS, BARRIERS, PLANNING AND BOOKING

Definition of a High Yield Traveller (HYT)



Willing to travel out of their region.



High overall trip expenditure with a minimum of \$200 per person per night

What HYTs are looking for in a holiday destination generally ⁶

- 1 Good food & wine
- 2 Safety & security
- 3 World class natural beauty
- 4 Value for money
- 5 Historic buildings & architecture

Good food & wine continues to be the most important factor, and much more important in Japan than for other markets. This is followed by safety and security which has increased during 2022. Ease of entering a country / obtaining a visa has also grown significantly.

HYTs Destination Choice and First Booking Timeframes ⁵

Based on last out of region holiday

Based on their last holiday, Japanese HVTs tend to decide on their holiday destination and make their first booking around 3-6 months before their trip.

HYTs Top Sources for Inspiration, Information & Booking ⁵

Inspiration

- 1 General internet searching
- 2 Travel/guide books
- 3 Online hotel booking site
- 4 Brochures
- 5 Traveller review sites

Booking



Flights

Travel website/app

Airline (online)

Travel agent (offline)



Activities

Travel agent (offline)

Travel website/app

Operator (online)



Accommodation

Travel website/app

Travel agent (offline)

Accomm. Provider (online)

Top 5 Barriers to HYTs visiting Australia ⁶

- 1 There are other places I would prefer to travel to/ have planned to travel to
- 2 I don't have enough annual leave
- 3 I have already travelled there and now want to see other places
- 4 It is easy to put off for another time
- 5 Expensive airfares

Competition from other destinations is the key barrier for Japanese travellers along with lack of time and cost of flights. To overcome these barriers, it will be important to promote quality food and wine and nature based experiences that are affordable, accessible and unique. Use tools such as sample itineraries to demonstrate the variety of experiences available in a short time.

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APPEALING WA DESTINATIONS AND EXPERIENCES

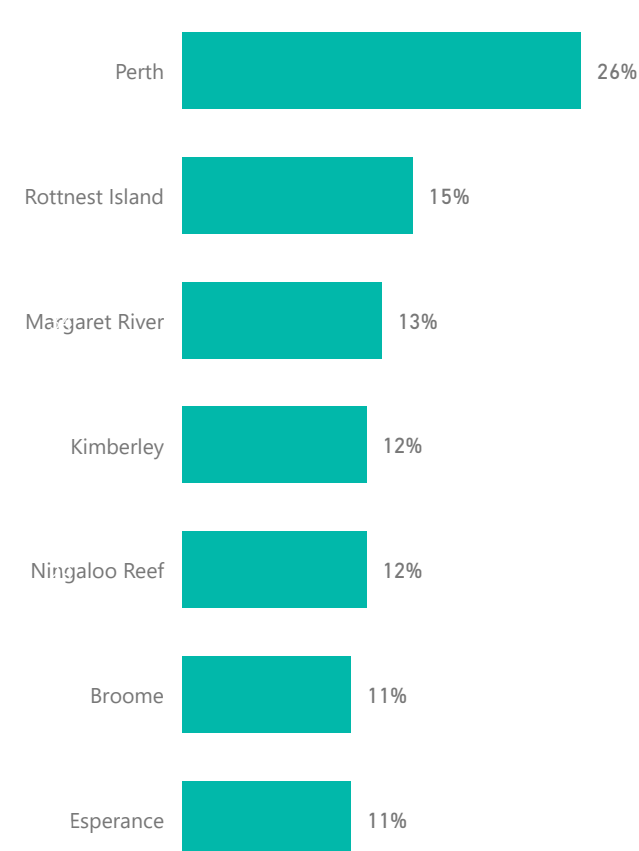
In research undertaken in 2018, Japanese HYTs were shown information and pictures of selected WA destinations and experiences. They were then questioned about those selected destinations and experiences, and the results are shown below.

These results indicate that Perth is the most preferred destination and WA's aquatic and coastal experiences generate the highest appeal amongst Japanese HYTs, whilst food and wine experiences tend to appeal more to Japanese HYTs than they do to other international HYTs.

Most Appealing Experiences⁷

- 1 Discovering untouched islands & beaches by boat**
(Esperance)
- 2 Lunch by the Swan River or Indian ocean**
(Perth & Surrounds)
- 3 Sunset camel ride along the beach**
(Broome)
- 4 Cruising along the untouched coast**
(Kimberley)
- 5 Picnic lunch & spotting kangaroos**
(Esperance)
- 6 Viewing marine wildlife**
(Rottnest Island)
- 7 Scenic flight over the pink lake**
(Esperance)
- 8 Snorkelling in the reef**
(Ningaloo Reef)
- 9 Admiring the Pink Salt Lakes**
(Rottnest Island)
- 10 Discovering restaurants, bars & cafes**
(Perth & Surrounds)

Most Appealing Destination⁷



Why These Destinations and Experiences Appeal⁷

Margaret River

"It is nice that you can play with kangaroos and dolphins, and the special products are very delicious"

Perth & Surrounds

"Because it seems that you can fully enjoy nature in places where safety is high"

"Because it seems to be able to fully enjoy both cutting-edge culture and nature"

Rottnest Island

"I want to enjoy the nature of the island, I want to escape the reality"

Notes

'Leisure' comprises both holiday visitors and those visiting friends and relatives (VFR).

References

1. Tourism Research Australia – International Visitor Survey, YE Dec 19
2. Tourism Research Australia – International Visitor Survey, YE Dec 18/19/20/21/22
3. Tourism Research Australia – International Visitor Survey, 3 yr average, YE Dec 17/18/19
4. Australian Bureau of Statistics via Tourism Research Australia – Visitor Arrivals and Departures (State of Stay: WA, Category of Traveller: Short Term Visitor Arrival, Main purpose of trip: Leisure, Country (TRA benchmarks)), YE Dec 19
5. Tourism Australia – Consumer Demand Project 2019.
6. Tourism Australia – Consumer Demand Project 2022.
7. BDA – International High Value Travellers - Western Australia State Report, 2019

Published by Tourism WA, April 2023

For more information, please contact: research@westernaustralia.com