JAPAN LEISURE VISITATION TO WA¹
- 19,700 leisure visitors to WA
- WA’s 10th largest international market by leisure visitors

JAPAN LEISURE VISITATION TO AUSTRALIA¹
- 319,200 leisure visitors to Australia
- Australia’s 5th largest international market by leisure visitors

MARKET OVERVIEW FOR 2017

$29.6 million spent by leisure visitors in WA¹
Average daily spend: $59
Average length of stay: 26 nights

MARKET OVERVIEW FOR 2017

One in ten Japanese visitors to WA are working holiday makers, equivalent to an average of 2,500 Japanese working holiday makers to WA a year.³

VISITORS AND SPEND IN WA BY PURPOSE¹

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Visitors</th>
<th>Spend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>54%</td>
<td>42%</td>
</tr>
<tr>
<td>Visiting Friends and Relatives</td>
<td>22%</td>
<td>7%</td>
</tr>
<tr>
<td>Business</td>
<td>18%</td>
<td>16%</td>
</tr>
<tr>
<td>Education</td>
<td>9%</td>
<td>31%</td>
</tr>
<tr>
<td>Other</td>
<td>5%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Arrivals peaked around the Christmas holiday period.
**WHAT THEY ARE LOOKING FOR IN A HOLIDAY DESTINATION GENERALLY**

<table>
<thead>
<tr>
<th>Safety and security</th>
<th>World class beauty and natural environments</th>
</tr>
</thead>
<tbody>
<tr>
<td>Good food, wine, local cuisine and produce</td>
<td>A safe and secure destination</td>
</tr>
<tr>
<td>World class natural beauty and wildlife</td>
<td>The local wildlife</td>
</tr>
<tr>
<td>Value for money</td>
<td>Friendly and open citizens</td>
</tr>
<tr>
<td>Rich history and heritage</td>
<td>Flights with no stop-overs</td>
</tr>
</tbody>
</table>

**LEISURE ACTIVITIES UNDERTAKEN ON THEIR TRIP TO AUSTRALIA**

Top 5 leisure activities undertaken by Japanese leisure visitors to WA during their trip to Australia.

- Eat out / dine at a restaurant and/or cafe
- Go shopping for pleasure
- Sightseeing/looking around
- Go to the beach
- Visit national parks / state parks

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**REASONS FOR CHOOSING AUSTRALIA**

- World class beauty and natural environments
- A safe and secure destination
- The local wildlife
- Friendly and open citizens
- Flights with no stop-overs

**MOST FAVOURED EXPERIENCES IN AUSTRALIA**

Concept testing of a range of tourism experiences in Australia and overseas reveals that the most preferred and intended Australian experiences by Japanese travellers are those that feature **aquatic and coastal, wildlife and nature, and food and wine** elements.

**Australian experiences**

Average of position of Australian experience featuring each theme

- Aquatic and Coastal
- History and Culture
- City
- Food and Wine
- Natural Beauty and Wildlife

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Prepared by the Tourism WA Strategy and Research Team
**TRIP PROFILE**

### TRAVEL PARTY

- Unaccompanied: 59%
- With a partner: 17%
- Group of friends/relatives: 20%
- Other: 4%

### LEISURE VISITORS BY AGE

**WA**
- 15-19 years: 5%
- 20-34 years: 45%
- 35-49 years: 26%
- 50-64 years: 17%
- 65+ years: 7%

**Australia**
- 15-19 years: 5%
- 20-34 years: 45%
- 35-49 years: 19%
- 50-64 years: 20%
- 65+ years: 10%

### REGIONAL DISPERSAL

An average of one in five (20%) of Japanese leisure visitors to WA spend at least one night in Regional WA.

- Australia’s North West: 3%
- Australia’s Coral Coast: 7%
- Australia’s South West: 11%
- Australia’s Golden Outback: 1%

### TRAVEL PACKAGES

Nearly one in five (17%) Japanese leisure visitors to WA arrived on a travel package (i.e., paid for their flight to Australia and at least one other component of their trip as one packaged price).

### REPEAT VISITORS

Two thirds (66%) of Japanese leisure visitors to WA are on a return visit to Australia.

### OTHER STATES VISITED

Three quarters (74%) of Japanese leisure visitors to WA only visit WA on their trip.

- 1-7 Nights: 60%
- 8-14 Nights: 16%
- 15-30 Nights: 8%
- 31+ Nights: 15%
BARRIERS TO VISITING AUSTRALIA

The main barriers preventing Japanese travellers visiting Australia are competition from other destinations and the perception that too much time is need to “do” an Australian holiday. Other key themes, like being too hard to plan a holiday here and that Australia is “too big”, indicate that it would be beneficial to promote itineraries to this market, showing that an authentic Australian holiday with good food and wine and nature elements is possible for any length of stay.

Top 3 Barriers to visiting Australia

- There are just other places I would prefer to travel to
- I don’t have enough annual leave
- It is too far to travel

DESTINATION CHOICE AND FIRST BOOKING TIMEFRAMES

Based on their last holiday, Japanese travelers tend to decide on their holiday destination and make their first booking between 1 and 6 months before their trip.

TOP 5 SOURCES FOR INSPIRATION, INFORMATION & BOOKING

Based on last out of region holiday

When searching for inspiration and planning their next out of region trip, Japanese travellers are more likely to turn to offline sources. Travel brochures and guide books are most preferred while general browsing on the internet, although the third most popular source of inspiration, is used far less by this market than by other international markets (on average). In regards to booking their holiday, Japanese travellers strongly prefer to use offline travel agents. Use of online travel agents, although also popular, has eased in recent years.

Inspiration

- Travel brochures
- Travel or guide books
- General internet searching
- Travel agent (telephone or in person)
- Been there before

Booking

- Travel agent (telephone or in person)
- Travel agent (online)
- Directly through airline (online)
- Accommodation provider (online)
- Other travel booking website
NOTES

*Expenditure excludes pre-paid package spend.

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

REFERENCES

1. Tourism Research Australia – International Visitor Survey, YE Dec 17
3. Tourism Research Australia – International Visitor Survey, 3 year average (YE Dec 2015/16/17)
4. Tourism WA – Consumer Demand Insights for Japan 2017
5. Tourism Australia – CDP 2017 Western Australia State Report