**MARKET OVERVIEW**

**JAPAN LEISURE VISITATION TO WA**
- 24,700 leisure visitors to WA
- WA’s 9th largest international market by leisure visitors

**MARKET OVERVIEW**
- $35.3 million spent by leisure visitors in WA
- Average daily spend: $68
- Average length of stay: 21 nights

**JAPAN LEISURE VISITATION TO AUSTRALIA**
- 352,100 leisure visitors to Australia
- Australia’s 5th largest international market by leisure visitors

**VISITORS AND SPEND IN WA BY PURPOSE**

<table>
<thead>
<tr>
<th>Purpose</th>
<th>Visitors</th>
<th>Spend</th>
</tr>
</thead>
<tbody>
<tr>
<td>Holiday</td>
<td>56%</td>
<td>43%</td>
</tr>
<tr>
<td>Visiting Friends and Relatives</td>
<td>23%</td>
<td></td>
</tr>
<tr>
<td>Business</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td>Education</td>
<td>9%</td>
<td>27%</td>
</tr>
<tr>
<td>Other</td>
<td>4%</td>
<td>7%</td>
</tr>
</tbody>
</table>

**SEASONALITY - SHORT-TERM LEISURE VISITOR ARRIVALS TO WA**

Arrivals fluctuate throughout the year.
TRAVEL PARTY

- Unaccompanied: 58%
- With a partner: 19%
- Group of friends/relatives: 20%
- Other: 3%

LEISURE VISITORS BY AGE

**WA**
- 15-19 years: 4%
- 20-34 years: 47%
- 35-49 years: 23%
- 50-64 years: 18%
- 65+ years: 7%

**Australia**
- 15-19 years: 5%
- 20-34 years: 45%
- 35-49 years: 20%
- 50-64 years: 21%
- 65+ years: 10%

REGIONAL DISPERSAL

- An average of one in five (18%) of Japanese leisure visitors to WA spend at least one night in Regional WA.
- Australia’s North West: 3%
- Australia’s Coral Coast: 8%
- Australia’s South West: 10%
- Experience Perth: 96%
- Australia’s Golden Outback: 1%

TRAVEL PACKAGES

- Nearly one in five (16%) 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 in three (67%) of Japanese leisure visitors to WA are on a return visit to Australia.

OTHER STATES VISITED

- 29% of Japanese leisure visitors to WA only visit WA on their trip.

LENGTH OF STAY – LEISURE VISITORS TO WA

- 1-7 Nights: 63%
- 8-14 Nights: 15%
- 15-30 Nights: 8%
- 31+ Nights: 14%

TOP 3 ACCOMMODATION CHOICES FOR LEISURE VISITORS TO WA

- Hotel/resort/motel or motor Inn: 50%
- Friends or relatives property: 27%
- Backpacker or hostel: 16%
High Value Travellers (HVTs) are a new target audience for Tourism Western Australia.

**DEFINITION OF A HIGH VALUE TRAVELLER**

- **Travel Long Haul**
- **Motivated by nature and wildlife, aquatic and coastal, and food and wine experiences**
- **Considering or intending to visit Australia.**
- **Represent “high value”: above average trip expenditure, and a higher likelihood to stay longer and disperse further.**

**WHAT JAPAN HVTs ARE LOOKING FOR IN A HOLIDAY DESTINATION GENERALLY**

- Good food, wine, local cuisine and produce
- World class nature & wildlife
- A safe and secure destination
- A destination that offers value for money
- World class coastlines, beaches and marine wildlife

**HVTs 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 needed to “do” an Australian holiday. Other key themes, like 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.

**HVTs DESTINATION CHOICE AND FIRST BOOKING TIMEFRAMES**

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.

**HVTs TOP SOURCES FOR INSPIRATION, INFORMATION & BOOKING**

<table>
<thead>
<tr>
<th>Inspiration</th>
<th>Booking</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel/guide books</td>
<td>Travel agent (online)</td>
</tr>
<tr>
<td>Online Travel agent</td>
<td>Travel agent (offline)</td>
</tr>
<tr>
<td>Brochures</td>
<td>Airline (online)</td>
</tr>
<tr>
<td>Internet searching</td>
<td>Accomm. provider (online)</td>
</tr>
<tr>
<td>Online hotel booking site</td>
<td>Other booking website</td>
</tr>
</tbody>
</table>

I don’t have enough annual leave
Other places I’d prefer to go
It is easy to put off for another time
In research undertaken in 2018, Japanese HVTs 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 the types of experiences in WA that will most appeal to Japanese HVTs.

**Most Appealing Destinations**

<table>
<thead>
<tr>
<th>Destination</th>
<th>Appeal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perth</td>
<td>26%</td>
</tr>
<tr>
<td>Rottnest Island</td>
<td>15%</td>
</tr>
<tr>
<td>Margaret River</td>
<td>13%</td>
</tr>
<tr>
<td>Kimberley</td>
<td>12%</td>
</tr>
<tr>
<td>Ningaloo Reef</td>
<td>12%</td>
</tr>
<tr>
<td>Broome</td>
<td>11%</td>
</tr>
<tr>
<td>Esperance</td>
<td>11%</td>
</tr>
</tbody>
</table>

**Most Appealing Experiences**

<table>
<thead>
<tr>
<th>Experience</th>
<th>Appeal</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discovering untouched islands &amp; beaches by boat (Esperance)</td>
<td>26%</td>
</tr>
<tr>
<td>Lunch by the Swan River or Indian ocean (Perth &amp; Surrounds)</td>
<td>15%</td>
</tr>
<tr>
<td>Sunset camel ride along the beach (Broome)</td>
<td>13%</td>
</tr>
<tr>
<td>Cruising along the untouched coast (Kimberley)</td>
<td>12%</td>
</tr>
<tr>
<td>Picnic lunch &amp; spotting kangaroos (Esperance)</td>
<td>11%</td>
</tr>
<tr>
<td>Viewing marine wildlife (Rottnest Island)</td>
<td>11%</td>
</tr>
<tr>
<td>Snorkelling in the reef (Ningaloo Reef)</td>
<td>12%</td>
</tr>
<tr>
<td>Scenic flight over the pink lake (Esperance)</td>
<td>12%</td>
</tr>
<tr>
<td>Admiring the Pink Salt Lakes (Rottnest Island)</td>
<td>12%</td>
</tr>
<tr>
<td>Discovering restaurants, bars &amp; cafes (Perth &amp; Surrounds)</td>
<td>11%</td>
</tr>
</tbody>
</table>

**Why These Destinations and Experiences Appeal**

**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"

**Margaret River**

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

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**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 18
3. Tourism Australia – Consumer Demand Project 2018 Japan Report
4. Tourism Research Australia – International Visitor Survey, 3 year average (YE Dec 2016/17/18)
5. Tourism Australia – Consumer Demand Project 2018 Western Australia State Report

**Published by Tourism WA, 2019**

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