

JAPAN | MARKET PROFILE 2025

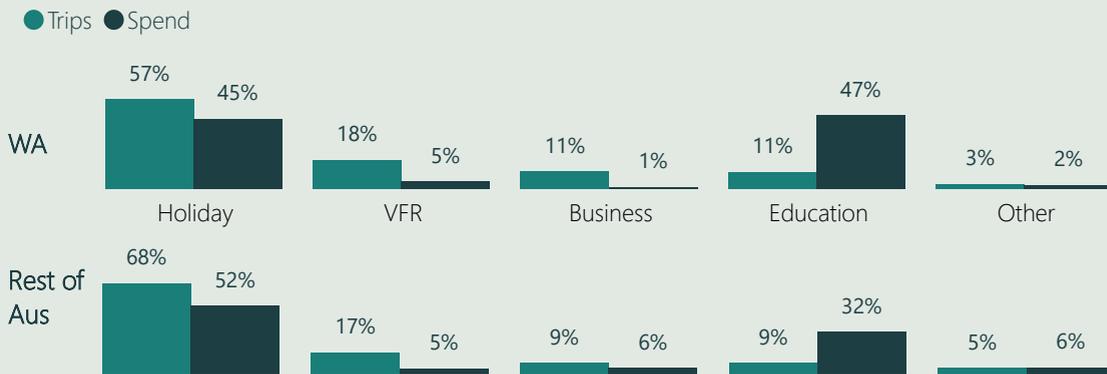
MARKET OVERVIEW

Leisure Visitation to WA (as compared to an average for other states/territories) ¹

Rest of Aus is an average of all other states excluding WA



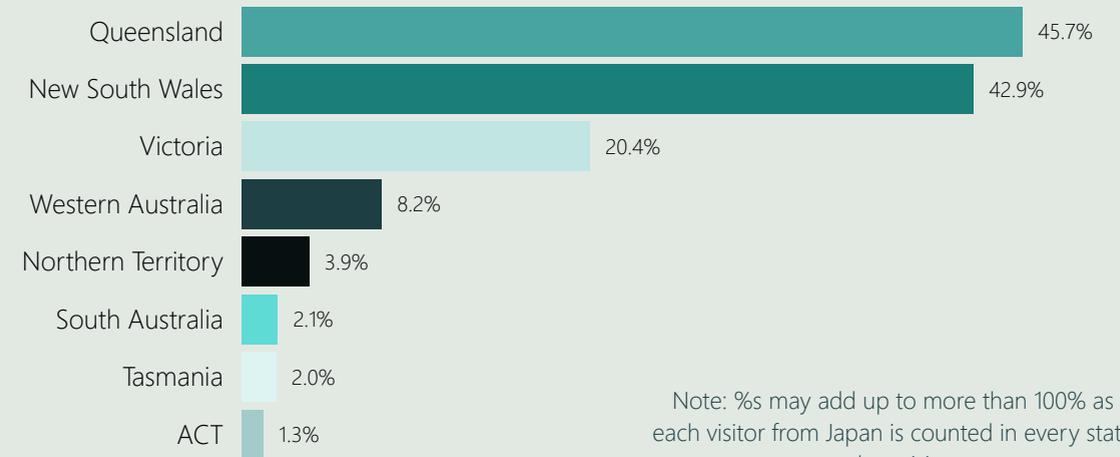
Total Trips and Spend by Purpose ¹



Leisure Visitation and Spend in WA ²



Market Share of Leisure Trips to Australia ¹



Note: %s may add up to more than 100% as each visitor from Japan is counted in every state they visit.

Market Share of Leisure Trip Spend in Australia ¹



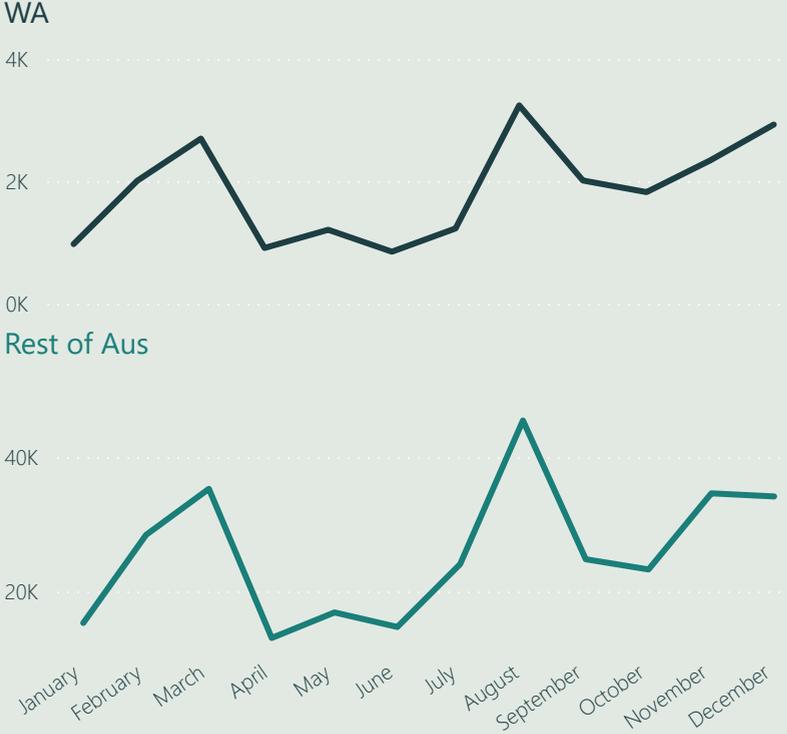
Explanatory note: 8.6% of all Japanese leisure trip spend in Australia was spent in WA.

Legend: WA, NSW, VIC, QLD, SA, TAS, NT, ACT

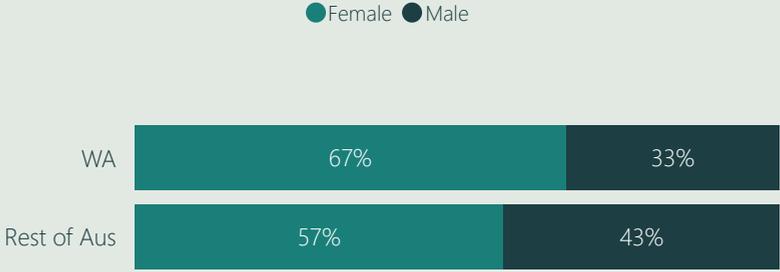
JAPAN | MARKET PROFILE

LEISURE TRIP PROFILE (TWO YEAR AVERAGE - 2024/25)

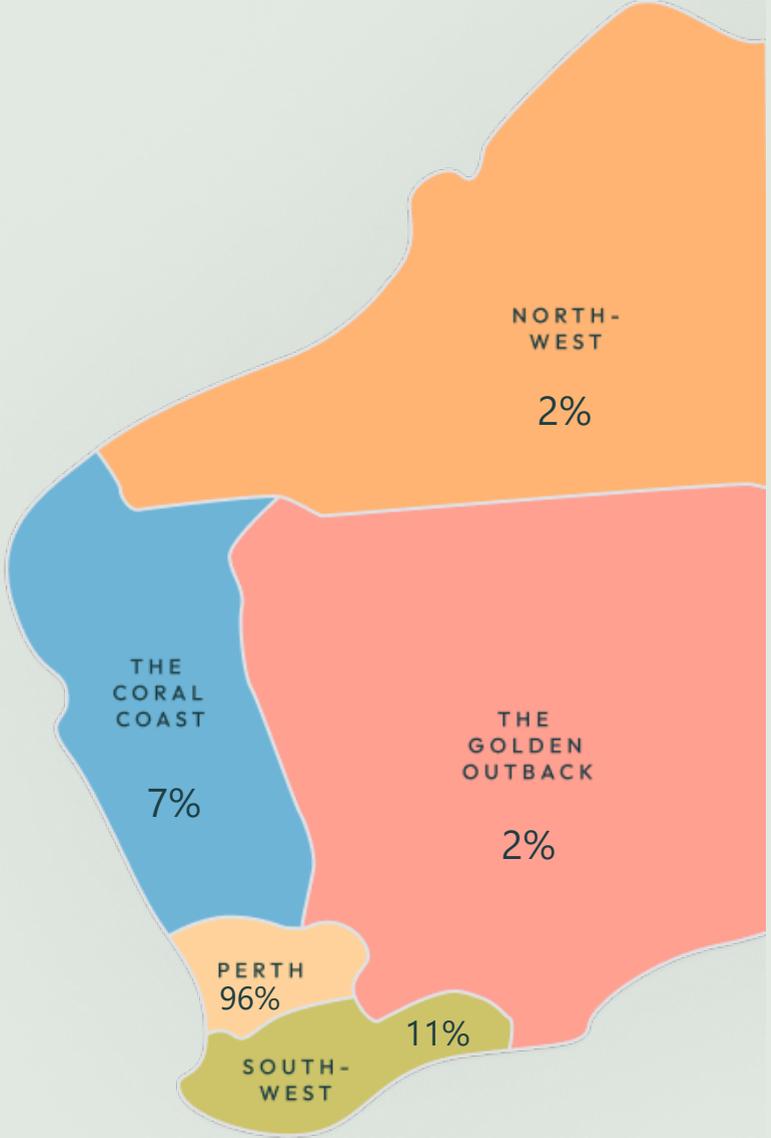
Seasonality - Short-term Leisure Visitor Arrivals ⁴



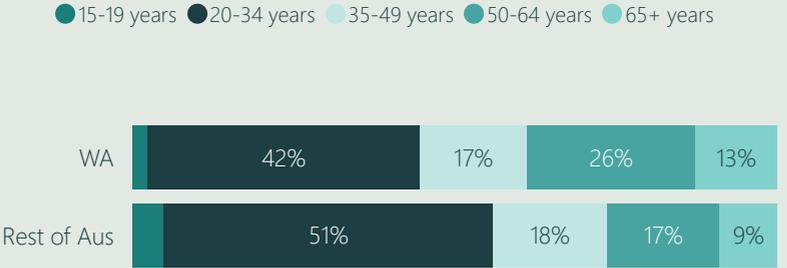
Gender ³



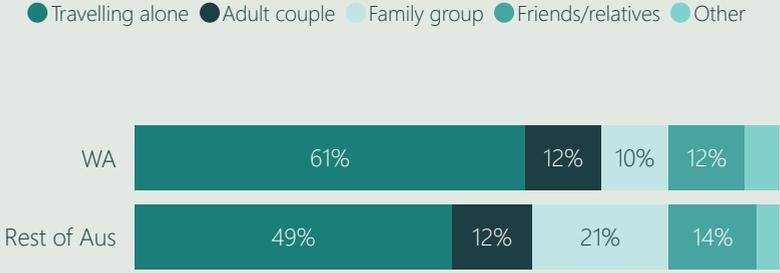
Regional Dispersal ³



Age ³



Travel Party ³



Average Length of Stay in State ³



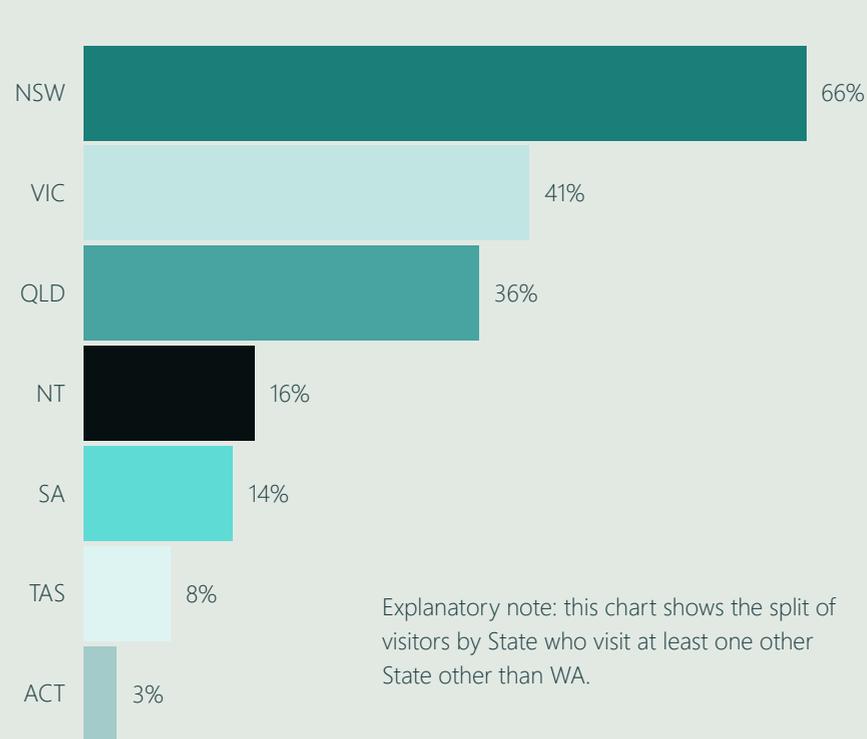
JAPAN | MARKET PROFILE

LEISURE TRIP PROFILE (TWO YEAR AVERAGE - 2024/25)

Top 10 Activities for Leisure Visitors to WA ³*

	WA	Rest of Aus
	%	%
① Eat out / dine at a restaurant and/or cafe	98%	91%
② Sightseeing/looking around	88%	82%
③ Go shopping for pleasure	87%	84%
④ Go to the beach	85%	67%
⑤ Visit national parks / state parks	82%	47%
⑥ Go to markets	63%	56%
⑦ Visit wildlife parks / zoos / aquariums	52%	46%
⑧ Visit botanical or other public gardens	49%	27%
⑨ Visit or stay on an island (2016 onwards)	48%	28%
⑩ Charter boat / cruise / ferry	47%	18%

Other States Visited ³



Group Tour v Free Independent Travellers (FIT) ³

78% of Japanese leisure visitors to WA are free independent travellers. 94% 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.

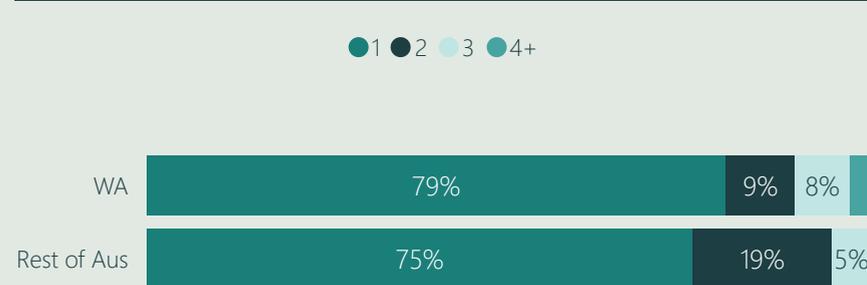
Repeat Visitors ³

66% of Japanese leisure visitors to WA are on a return visit to Australia whilst the proportion for the rest of Australia is 42%.

Top 3 Accommodation Choices for Leisure Visitors to WA ³

	WA	Rest of Aus
	%	%
① Hotel/resort/motel or motor Inn	56%	72%
② Friends or relatives property	24%	15%
③ Other commercial accommodation	23%	19%

Number of States Visited ³



Travel Packages ³

22% of Japanese leisure visitors to WA arrived on a travel package and the percentage this type of visitor makes up in the rest of Australia is 22%.

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

JAPAN | MARKET PROFILE

IMPORTANCE FACTORS, DESTINATION CONSIDERATIONS AND ASSOCIATIONS

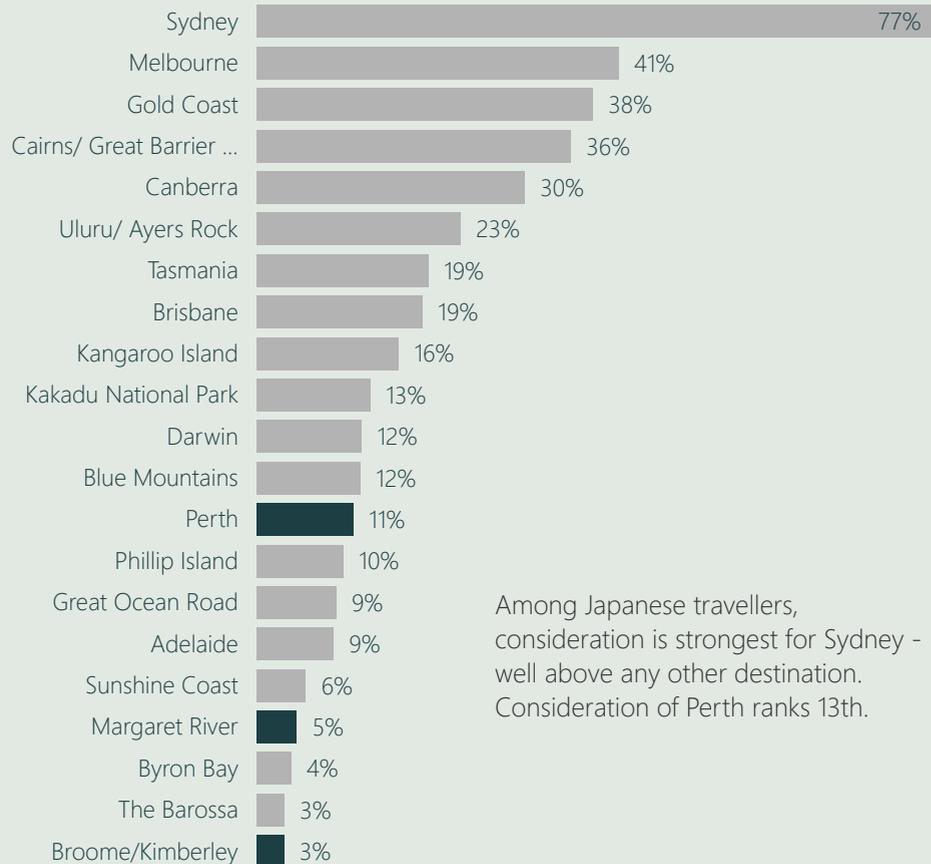
Out of region (OOR) travellers



Travelled outside of their region within the last 5 years for leisure and/or intend to travel outside of their region for leisure within the next 2 years

Consideration of Australian Destinations ⁵

(those considering a trip to Australia in the next 4 years)



Among Japanese travellers, consideration is strongest for Sydney - well above any other destination. Consideration of Perth ranks 13th.

Which factors are most important when choosing a destination ⁵

- ① A safe and secure destination
- ② Easy to get to (time & effort)
- ③ Good food, wine/beverages, local cuisine and produce
- ④ Value for money
- ⑤ Appealing climate or weather
- ⑥ Great shopping

Japanese travellers seek safe destinations which are easy to get to (time & effort). They are more likely than the average traveller to seek good food, wine, and local produce when choosing a travel destination. They are also more likely prioritise great shopping opportunities.

What OOR travellers associate with destinations ⁵

	Sydney	Melbourne	Brisbane	Perth	Margaret River	Broome/Kimberley region
A family friendly destination	50%	30%	10%	7%	3%	3%
A vibrant city lifestyle	66%	38%	15%	9%	2%	3%
Beautiful natural environments	11%	8%	6%	9%	5%	5%
Different and interesting local wildlife	8%	6%	3%	5%	3%	4%
Good food, wine/beverages, local cuisine and produce	54%	34%	14%	13%	5%	4%
Interesting events and festivals	46%	22%	8%	6%	3%	3%
Value for money	28%	15%	6%	9%	2%	2%

Japanese travellers have strong associations with Sydney, but low associations with West Australian destinations.

JAPAN | MARKET PROFILE

DEFINITIONS & SOURCES

Definitions

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

Sources

1. Tourism Research Australia – International Visitor Survey, YE Dec 25
2. Tourism Research Australia – International Visitor Survey, YE Dec 19/20/21/22/23/24/25
3. Tourism Research Australia – International Visitor Survey, 2 yr average, YE Dec 24/25
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 25
5. Tourism Australia – Consumer Demand Project, October - December 2025.

Published by Tourism WA, April 2026

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