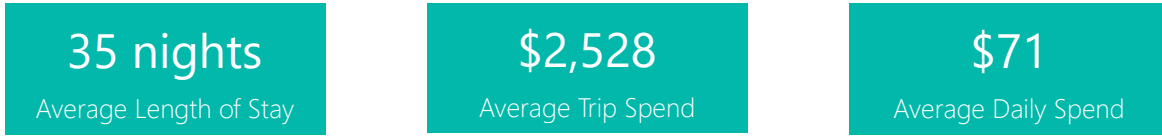


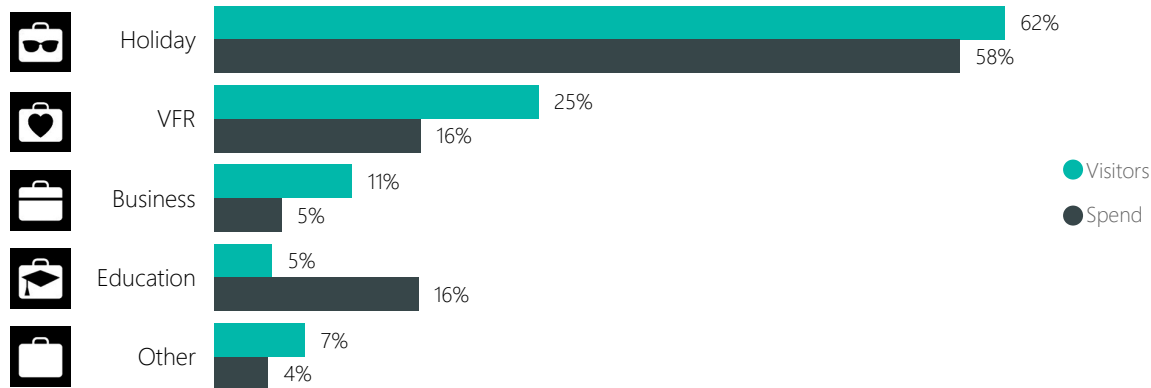
JAPAN | MARKET PROFILE 2023

MARKET OVERVIEW

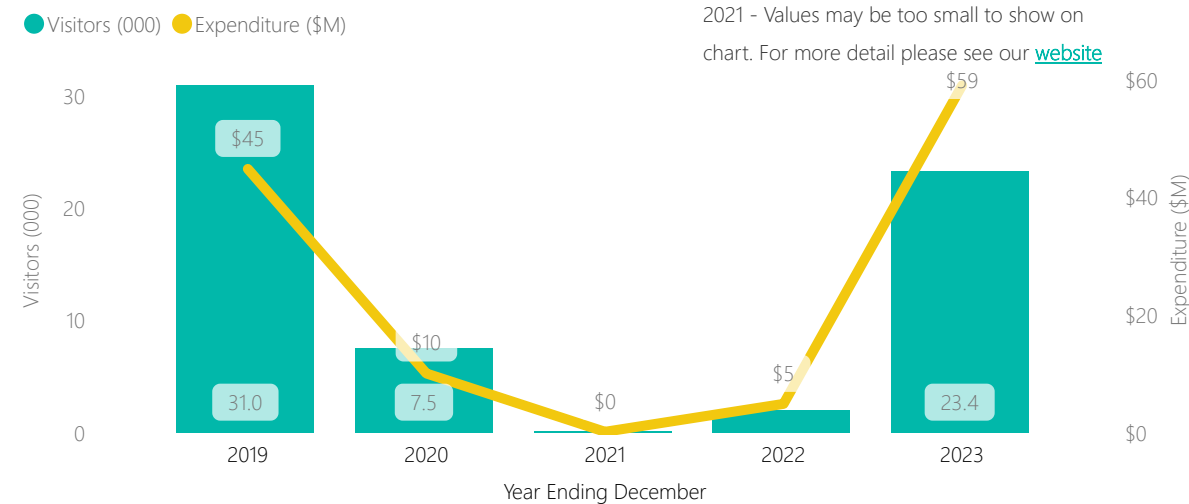
Leisure Visitation to WA¹



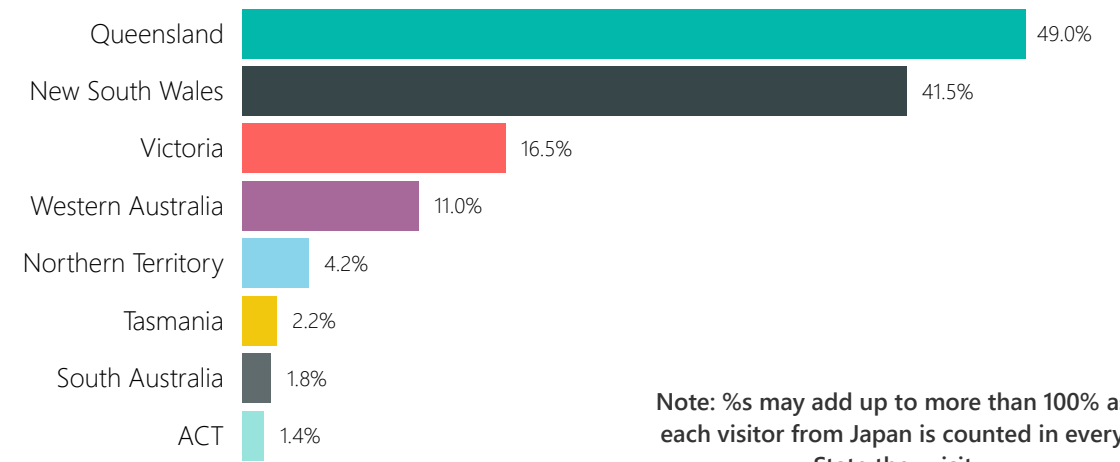
International Visitors and Spend by Purpose (WA)¹



Leisure Visitation and Spend to WA²

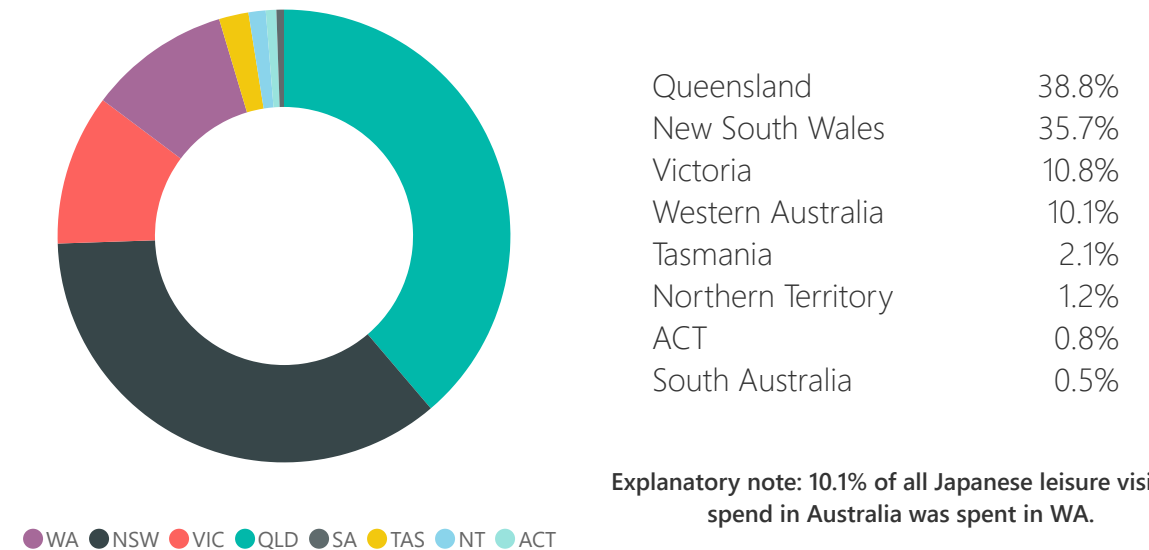


Market Share of International Leisure Visitors to Australia¹



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

Market Share of International Leisure Visitor Spend in Australia¹

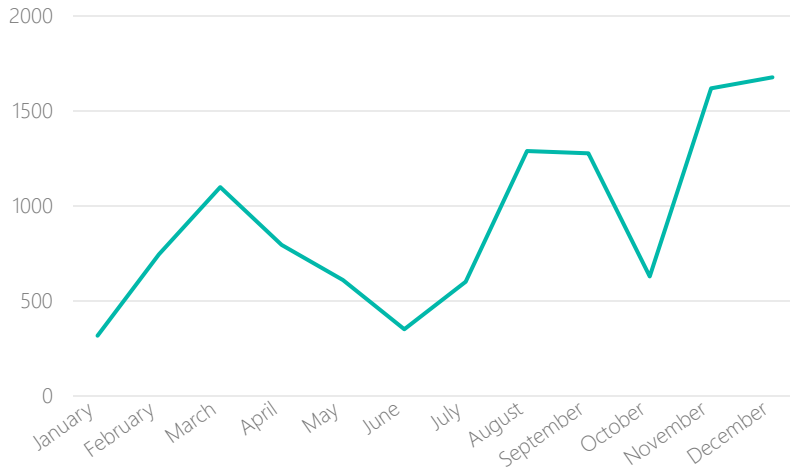


Explanatory note: 10.1% of all Japanese leisure visitor spend in Australia was spent in WA.

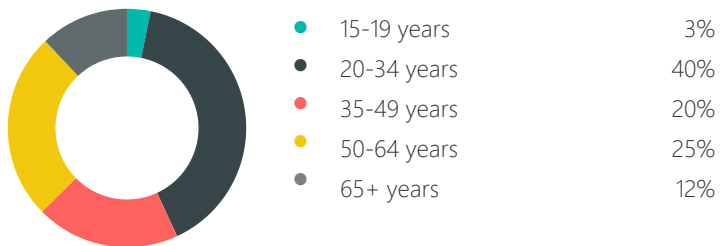
JAPAN | MARKET PROFILE

TRIP PROFILE (TWO YEAR AVERAGE - 2019/23)

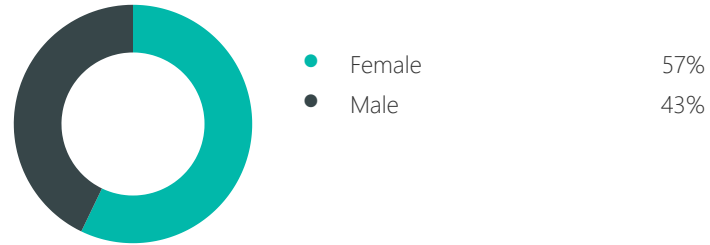
Seasonality - Short-term Leisure Visitor Arrivals to WA⁴



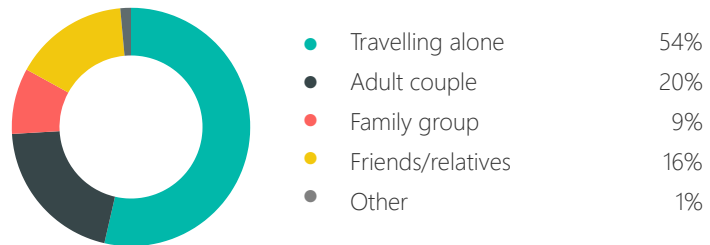
Age³



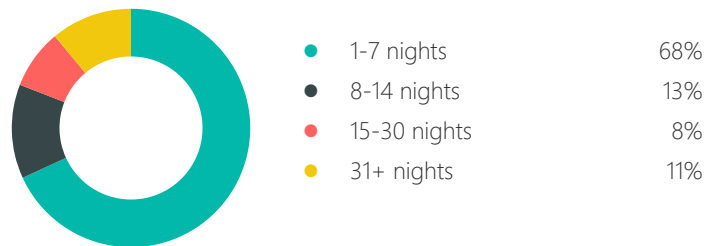
Gender³



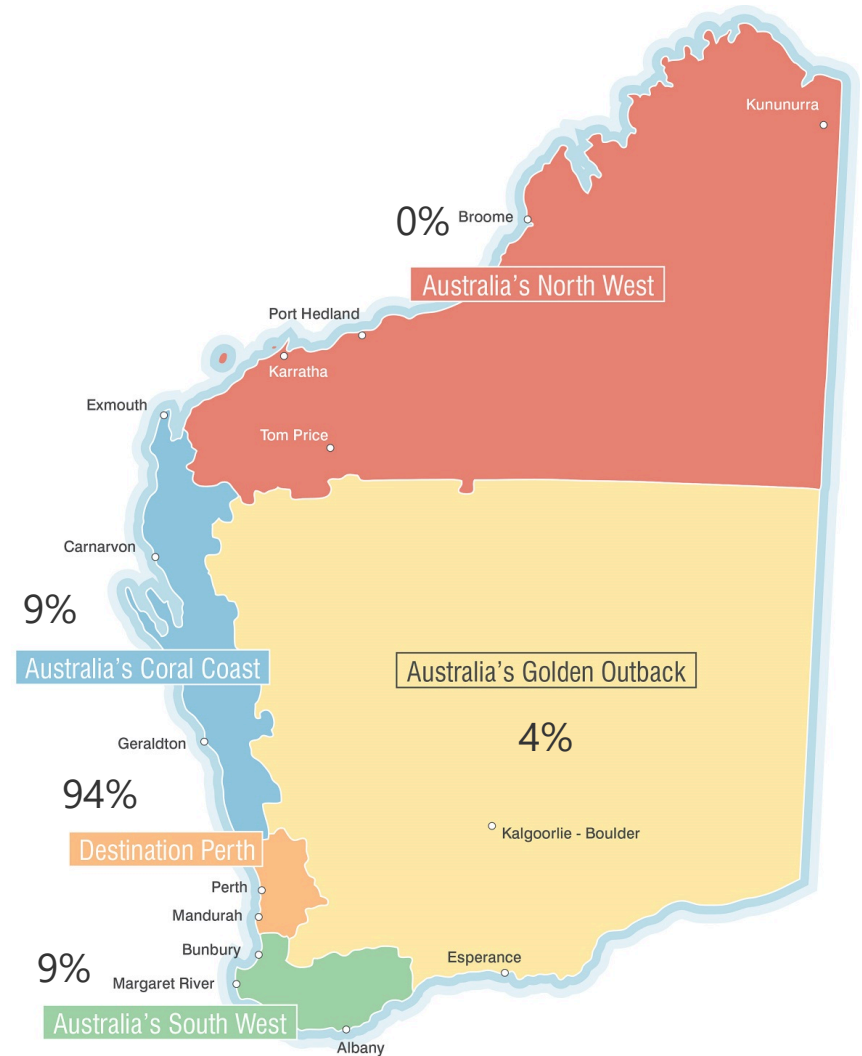
Travel Party³



Length of Trip³



Regional Dispersal³



JAPAN | MARKET PROFILE

TRIP PROFILE (TWO YEAR AVERAGE - 2019/23)

Top 5 Activities for Leisure Visitors to WA³

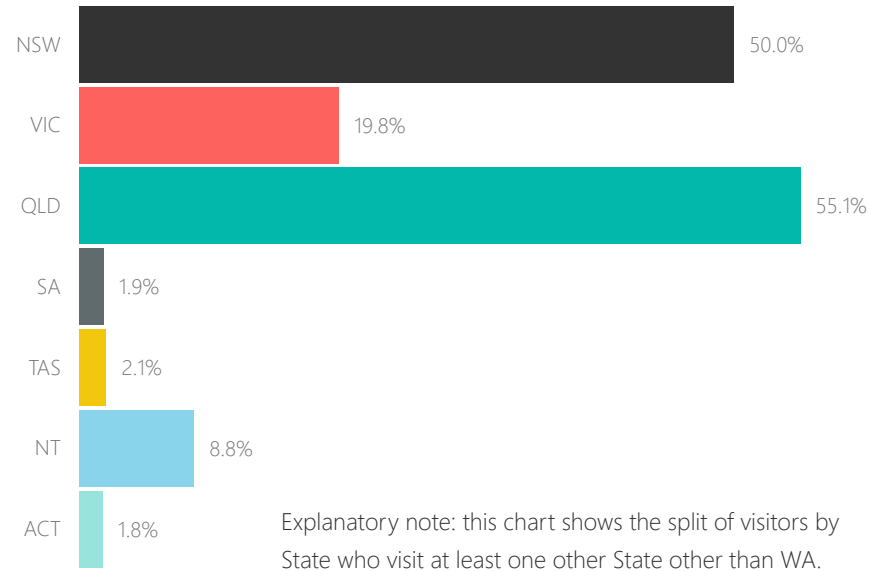
- | | | |
|---|--|-----|
| ① | Eat out / dine at a restaurant and/or cafe | 96% |
| ② | Go shopping for pleasure | 90% |
| ③ | Go to the beach | 70% |
| ④ | Sightseeing/looking around | 91% |
| ⑤ | Visit national parks / state parks | 78% |

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

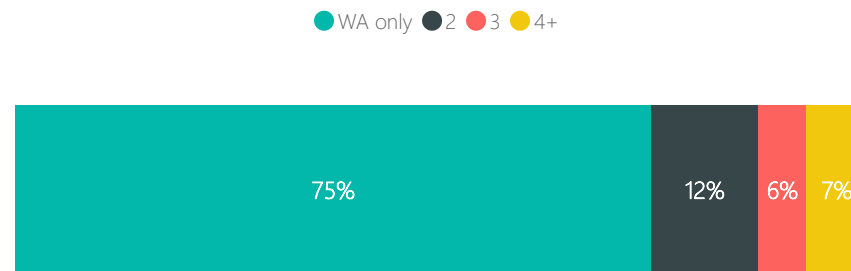
Top 3 Accommodation Choices for Leisure Visitors to WA³

- | | | |
|---|---------------------------------|-----|
| ① | Hotel/resort/motel or motor Inn | 61% |
| ② | Other Private Accommodation | 32% |
| ③ | Friends or relatives property | 22% |

Other States Visited³



Number of States Visited³



Group Tour v Free Independent Travellers (FIT)³

88% of Japanese leisure visitors to WA are free independent travellers. Equally, 92% 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

21% of Japanese leisure visitors to WA arrived on a travel package

JAPAN | MARKET PROFILE

IMPORTANCE FACTORS, DESTINATION CONSIDERATIONS AND ASSOCIATIONS

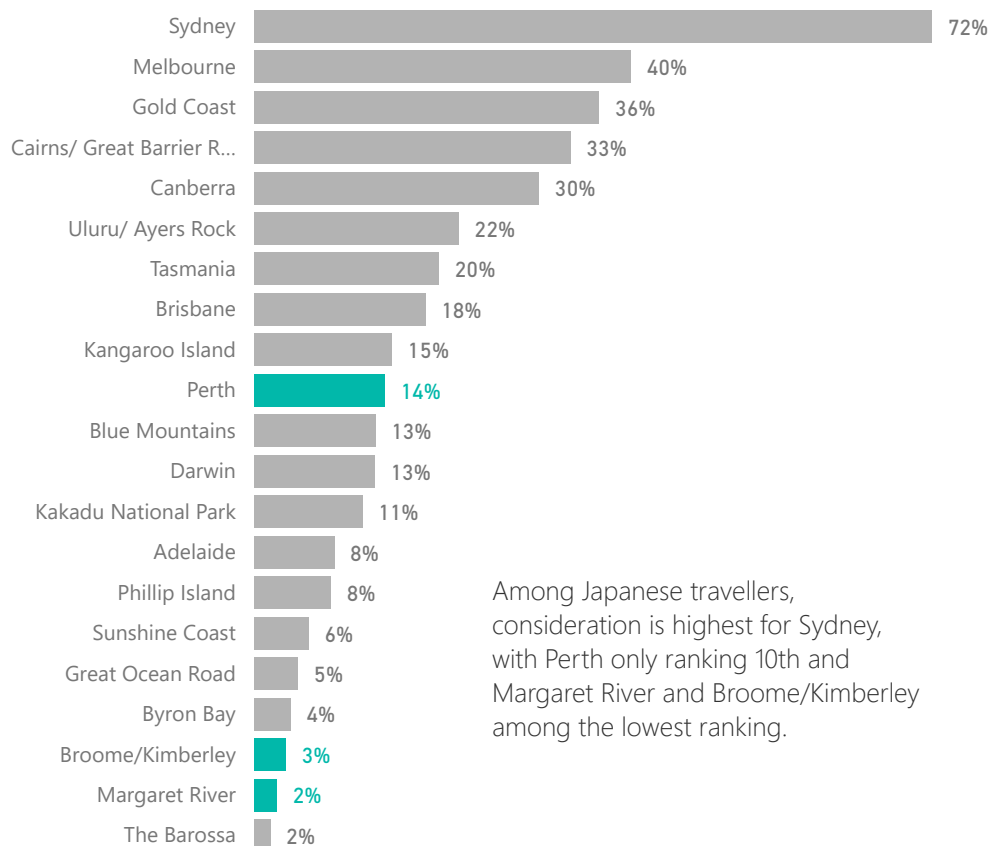
Out of region (OOR) travellers



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 highest for Sydney, with Perth only ranking 10th and Margaret River and Broome/Kimberley among the lowest ranking.

Which factors are most important when choosing a destination ⁵

- ① A safe and secure destination 53%
- ② Good food, wine/beverages, local cuisine and produce 40%
- ③ Easy to get to (time & effort) 31%
- ④ Value for money 28%
- ⑤ Beautiful natural environments e.g. mountains, rivers, forests 28%
- ⑥ Clean and hygienic 27%

Japanese travellers state that they are looking for a safe and secure destination, as well as good food, wine and local produce; which is of higher importance than at a global view.

What OOR travellers associate with destinations ⁵

| | Sydney | Melbourne | Brisbane | Perth | Margaret River | Broome/Kimberley region |
|--|--------|-----------|----------|-------|----------------|-------------------------|
| A family friendly destination | 51% | 26% | 9% | 11% | 3% | 3% |
| A vibrant city lifestyle | 69% | 38% | 14% | 9% | 3% | 2% |
| Beautiful natural environments | 14% | 8% | 6% | 9% | 6% | 7% |
| Different and interesting local wildlife | 10% | 7% | 4% | 6% | 4% | 5% |
| Good food, wine/beverages | 56% | 36% | 14% | 12% | 4% | 4% |
| Interesting events and festivals | 46% | 27% | 9% | 7% | 3% | 4% |
| Value for money | 34% | 19% | 6% | 7% | 3% | 3% |

Japanese travellers associate Sydney with a vibrant city lifestyle and good food/wine. Due to low consideration, WA destinations are not highly associated with any factors.

JAPAN | MARKET PROFILE

NOTES & REFERENCES

Notes

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

References

1. Tourism Research Australia – International Visitor Survey, YE Dec 23
2. Tourism Research Australia – International Visitor Survey, YE Dec 19/20/21/22/23
3. Tourism Research Australia – International Visitor Survey, 2 yr average, YE Dec 19/23 (2020-2022 cannot be used)
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 23
5. Tourism Australia – Consumer Demand Project, July - December 2023.

Published by Tourism WA, April 2024

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