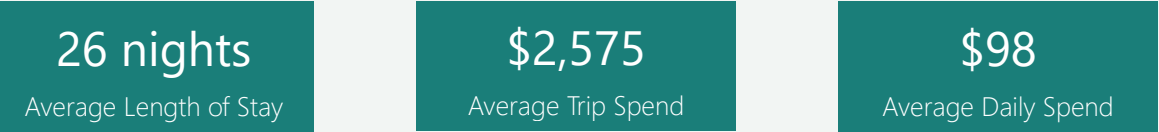


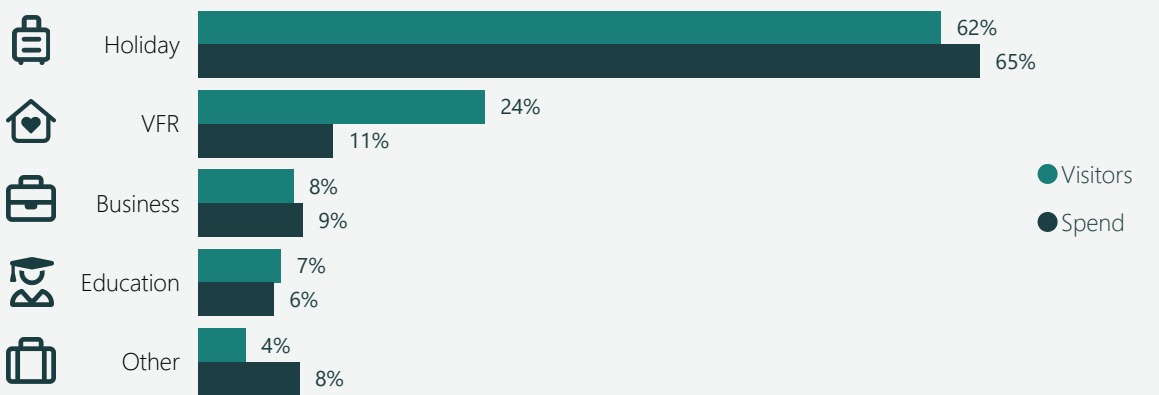
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MARKET OVERVIEW

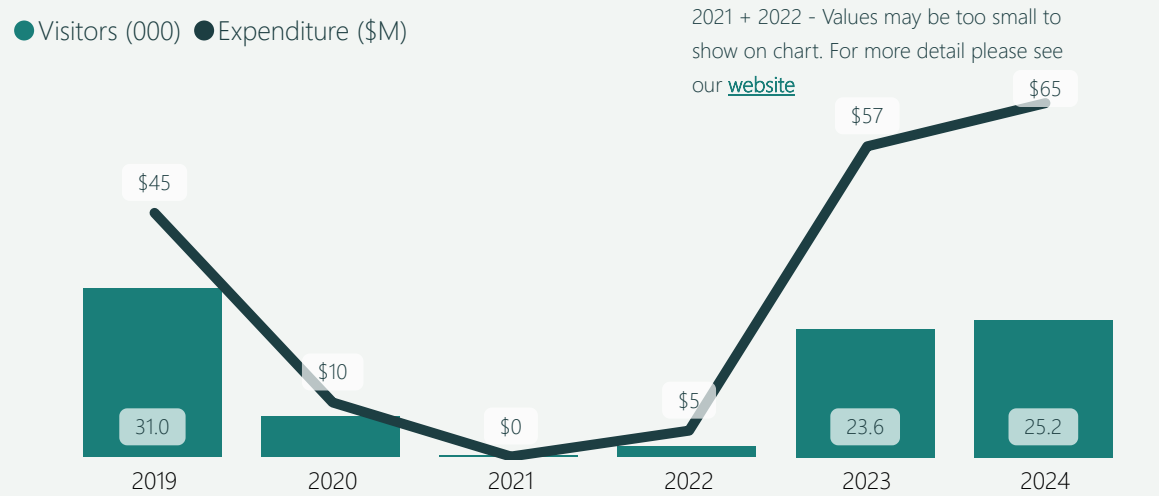
Leisure Visitation to WA ¹



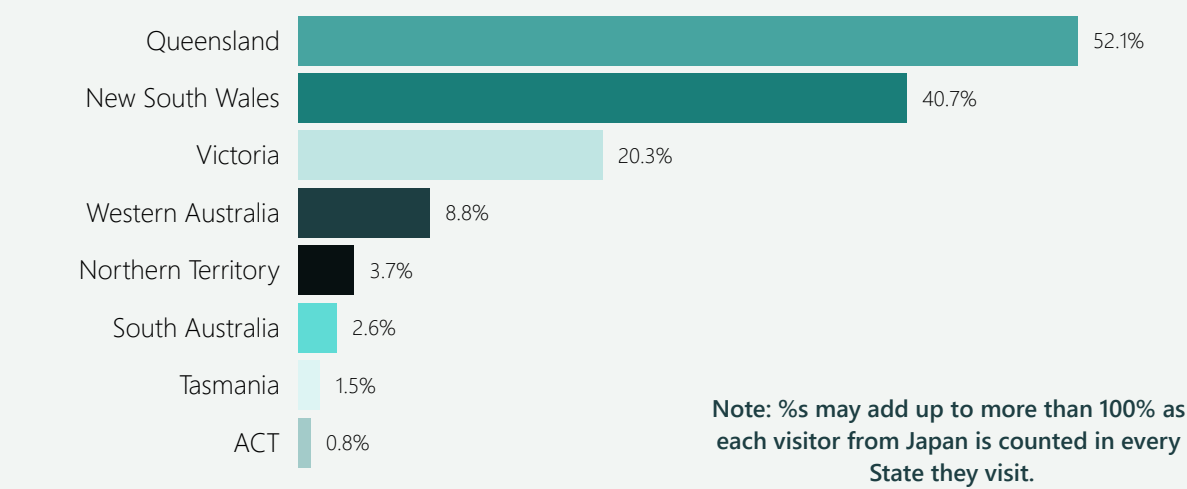
International Visitors and Spend by Purpose (WA) ¹



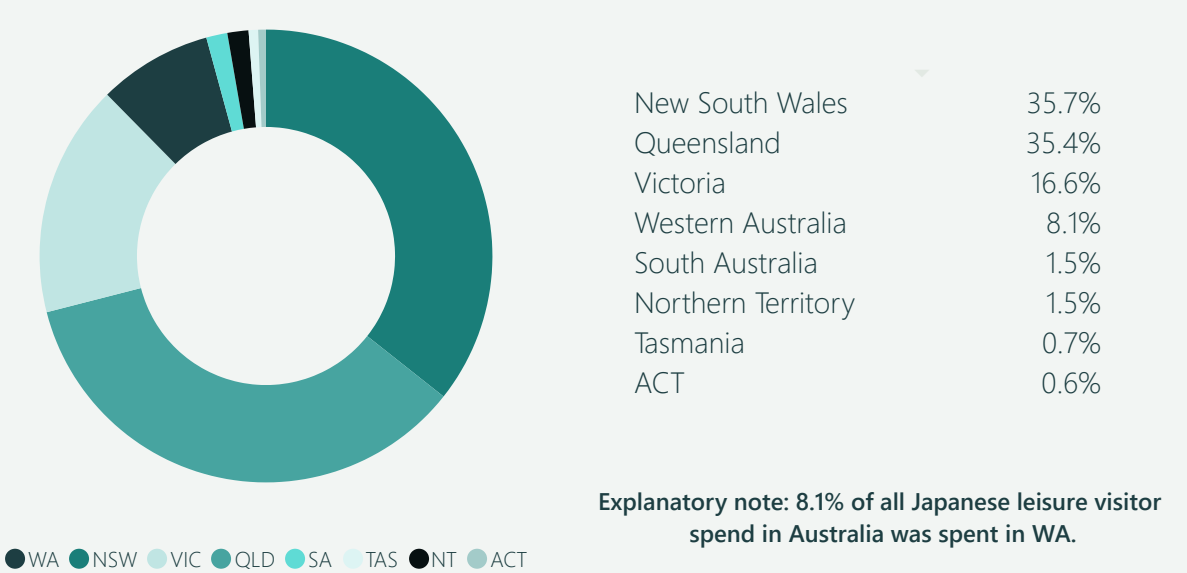
Leisure Visitation and Spend to WA ²



Market Share of International Leisure Visitors to Australia ¹



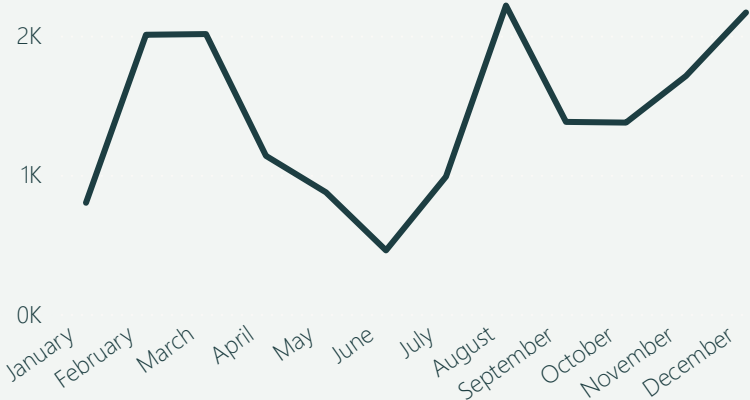
Market Share of International Leisure Visitor Spend in Australia ¹



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TRIP PROFILE (TWO YEAR AVERAGE - 2023/24)

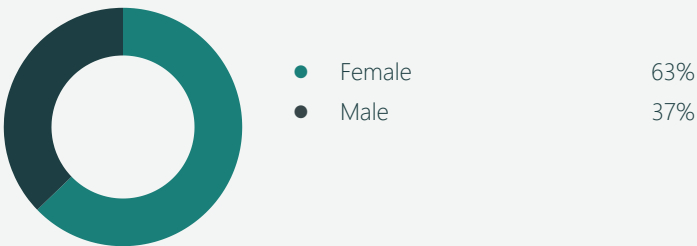
Seasonality - Short-term Leisure Visitor Arrivals to WA ⁴



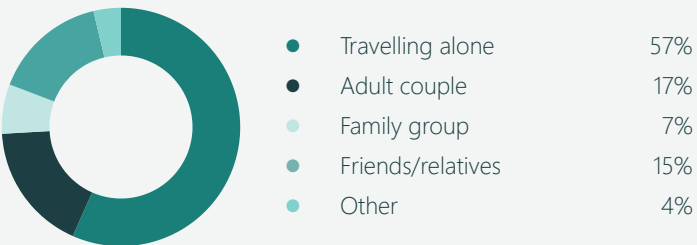
Age ³



Gender ³



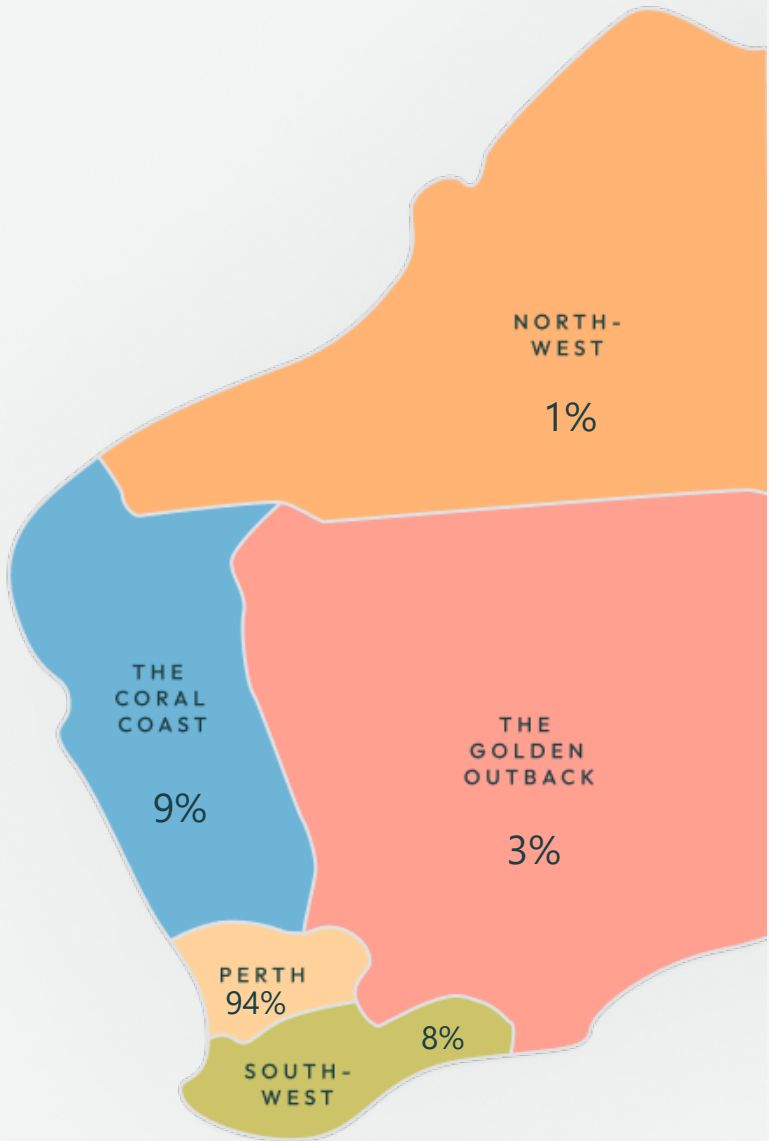
Travel Party ³



Length of Trip ³



Regional Dispersal ³



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TRIP PROFILE (TWO YEAR AVERAGE - 2023/24)

Top 5 Activities for Leisure Visitors to WA ³

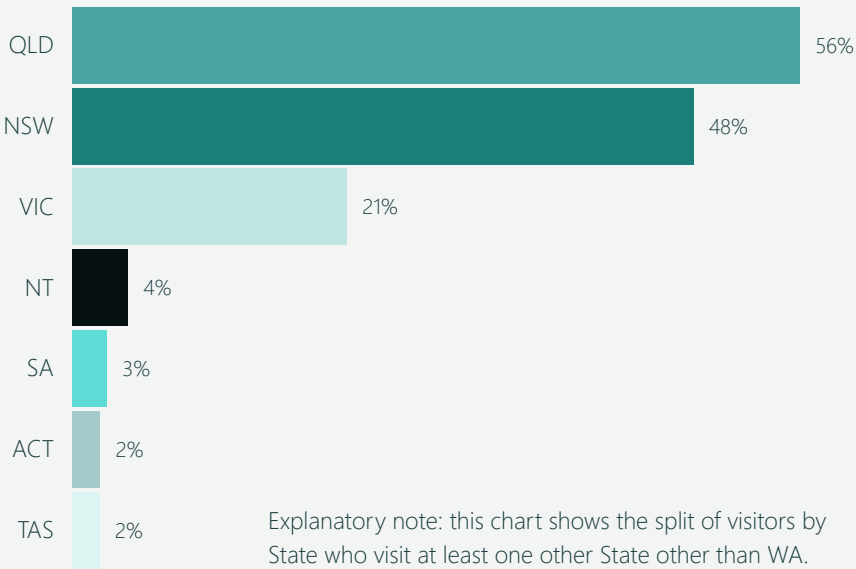
①	Eat out / dine at a restaurant and/or cafe	98%
②	Go shopping for pleasure	96%
③	Sightseeing/looking around	92%
④	Go to the beach	85%
⑤	Visit national parks / state parks	81%

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

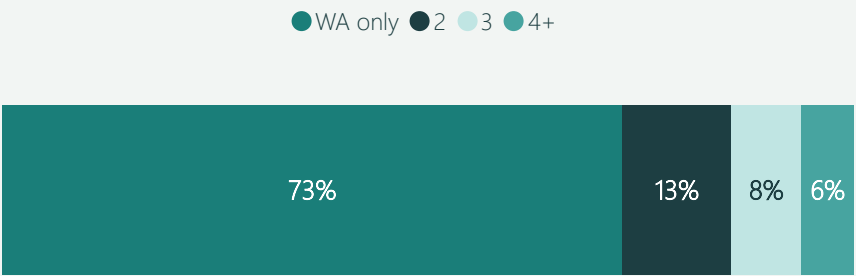
Top 3 Accommodation Choices for Leisure Visitors to WA ³

①	Hotel/resort/motel or motor Inn	53%
②	Friends or relatives property	26%
③	Other commercial accommodation	23%

Other States Visited ³



Number of States Visited ³



Group Tour v Free Independent Travellers (FIT) ³

85% 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

69% of Japanese leisure visitors to WA are on a return visit to Australia

Travel Packages ³

18% of Japanese leisure visitors to WA arrived on a travel package

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IMPORTANCE FACTORS, DESTINATION CONSIDERATIONS AND ASSOCIATIONS

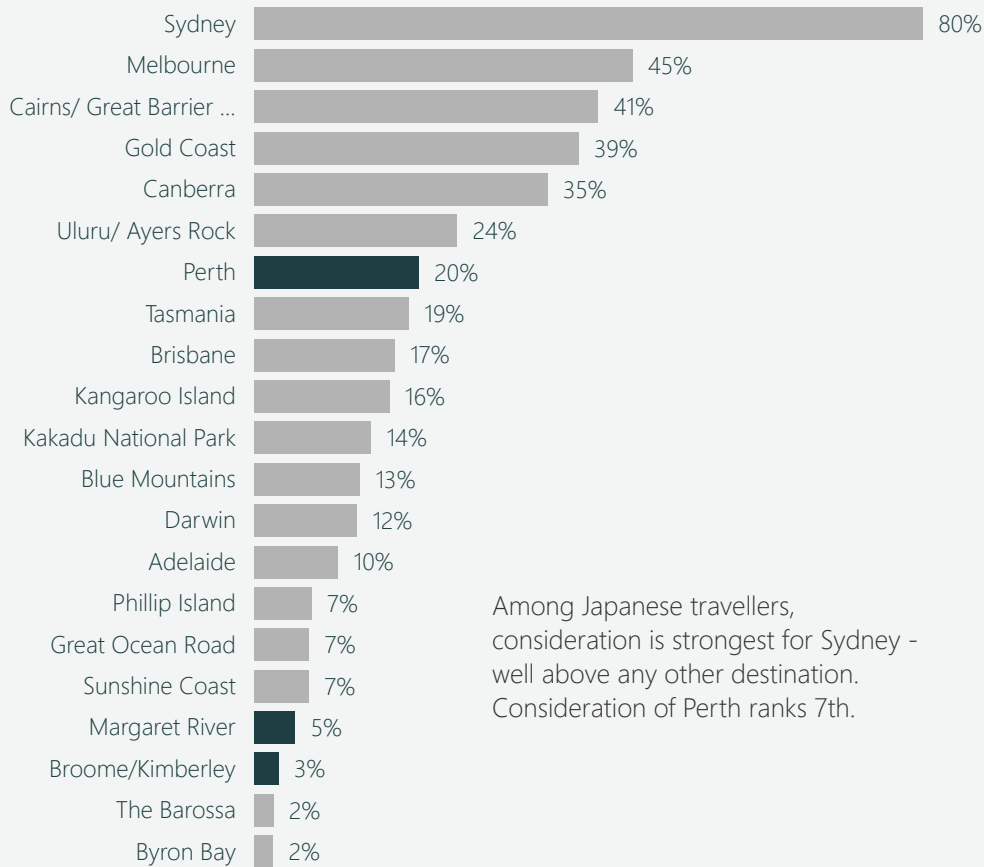
Out of region (OOR) travellers



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 7th.

Which factors are most important when choosing a destination ⁵

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

Japanese travellers are more likely than the average traveller to be seeking good food, wine, and local produce when choosing a travel destination. They are also more likely prioritse great shopping opportunities.

What OOR travellers associate with destinations ⁵

	Sydney	Melbourne	Brisbane	Perth	Margaret River	Broome/Kimberley region
A family friendly destination	55%	27%	10%	9%	3%	4%
A vibrant city lifestyle	67%	34%	13%	6%	3%	3%
Beautiful natural environments, including mountains, rivers, forests, beaches, and coastlines	13%	7%	5%	8%	7%	6%
Different and interesting local wildlife	11%	6%	3%	4%	3%	5%
Good food, wine/beverages, local cuisine and produce	58%	33%	13%	12%	3%	5%
Interesting events and festivals	44%	23%	8%	6%	4%	5%
Value for money	36%	15%	8%	7%	3%	3%

Japanese travellers have strong associations with Sydney, but very few associations with Perth.

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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 24
2. Tourism Research Australia – International Visitor Survey, YE Dec 19/20/21/22/23/24
3. Tourism Research Australia – International Visitor Survey, 2 yr average, YE Dec 23/24
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 24
5. Tourism Australia – Consumer Demand Project, October - December 2024.

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