



The Japanese Traveller

Segmentation of the Japanese Market



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Background

Tourism Australia recognised the need for a ground up review of our understanding of the Japanese traveller in 2005. The main feature of this review was a major segmentation study of the outbound traveller market.

One of our key findings was rigidly defined socio-demographic segmentation is much less relevant in Japan than it used to be. Much like all other inbound markets, segmentation based on attitudes to life in general and tourism specifically, is considered more informative and therefore valuable for marketing purposes.

This fact sheet provides an in-depth profile of the different attitudinal segments we found and is one of a series of documents created to increase your understanding of long haul travellers in Japan (for more information on the document suite, see the end of this document).

This fact sheet gives a detailed overview of the segments in this market and practical information profiling each group including:

- Demographic profiling of each segment
- Approach to long haul travel
- Perception of Australia
- What inspires them
- How to reach them in the media

- Timeline for planning their holidays and the sources they use when planning
- Travel profile
- Holiday activities of interest
- Long haul destinations that come into consideration

Not all the segments identified will be actively targeted by Tourism Australia's global marketing activities. Tourism Australia's global brand campaign is targeting a global communication segment called the Experience Seeker. Communications designed to appeal to the Experience Seeker will also motivate many of the segments identified in Japan (for more information refer to the Experience Seeker fact sheets).

The information contained in this fact sheet provides important insight into the product/activity needs of specific segments including:

- Creating a strong and effective offer
- Crafting marketing messages for greatest effect
- Identifying segment specific marketing opportunities
- Optimising the effectiveness of communications plans
- Getting inspiration for new product ideas



Segmentation helps us to:

1. Maximise the return on investment of our marketing activity

Segmentation helps us to identify segments in the Japanese market where the return on investment for our marketing dollar will be greatest. By profiling the market segments, we can identify which segments will be most receptive to what Australia has to offer, which will provide the greatest yield, and which are most likely to disperse. Our marketing activity can then be directed at those segments, rather than at the market as a whole and we can better direct our marketing funds by more efficient targeting.

2. Understand the composition of the market better

By segmenting the market we can understand the composition, or groups that exist in the Japanese travel market better. We begin to appreciate why travellers visit Australia and why they don't. We identify which travellers are most likely to come here, and which travellers won't. We learn how they plan and book their holidays, where they get information, what they like to do on holiday and much more. All this information helps us to develop more effective marketing campaigns and more attractive tourism products.

3. Communicate more effectively to our target segments

Psychographically based segmentation is based upon the emotional and rational motivations that drive people's travel choices. It also provides us with insight into where the segments look for travel information and what media channels they pay most attention to. This information enables us to develop marketing communications campaigns that are specifically designed to reach our target segments and to communicate messages that they find powerful and motivating.

What segments are there in the Japanese market?

There are many ways to segment a market: by life-stage, attitudes, needs, behaviours or just about any other consumer characteristic you can imagine. The best segmentations have these aspects in common:

- The segments are easy to identify and access in the marketplace;
- They are sufficiently large, valuable and distinct to justify a dedicated marketing strategy;
- The segments are sustainable over time.

In this case, the segments were determined using two criteria; the horizontal axis indicating the level of experience in long haul travel and the vertical axis indicating the respondents preference towards challenging themselves when travelling. These two criteria were chosen as they were seen as core attributes of those likely to visit Australia.

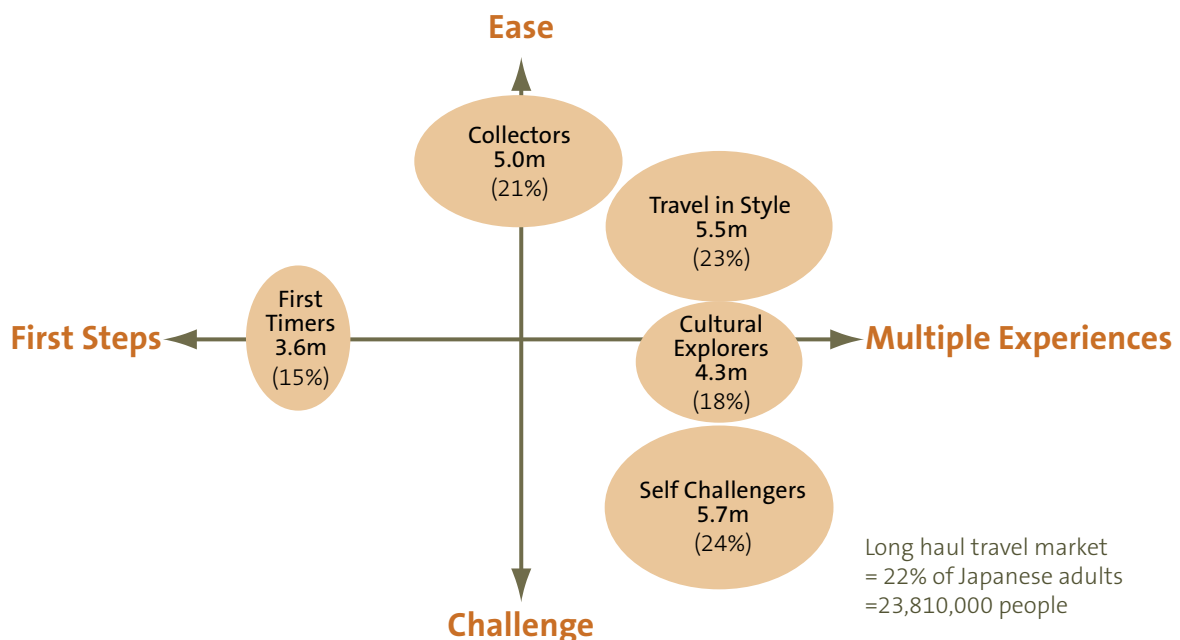
Given the various factors that come into consideration when choosing a travel destination, the position of each segment was determined using a combination of emotional, attitudinal and behavioural elements.

In segmenting the Japanese travel market we looked to develop a segmentation model that could provide the foundation for a full range of marketing programs and strategies including brand communications, media planning, promotions, public relations, product development and our international media programs.

Taking these factors into account, we identified five distinct segments in the Japanese long haul travel market:

- Self-Challengers
- Cultural Explorers
- Travel in Style
- Collectors
- First Timers

These segments are distinguished by their travel experience on the one hand, and their attitudes to travel and the style of travel experience they seek on the other. Almost every long haul traveller in Japan can be allocated to one of the five segments we've identified. Together, the five segments account for more than 23.8 million people.



Over the next few pages, we'd like to introduce you to the five segments and share with you the key characteristics that set each segment apart from the rest of the long haul market in Japan.

Self-Challengers

“My ideal trip is to cross a continent. I want to see various countries with my own eyes, not through books or TV. I want to travel in a way that allows me some kind of flexibility and offers me the opportunities to interact with the locals at the destination.” Female, 21

Segment highlights

Segment size	5.7 million long haul travellers / 24% of the long haul market
Heart of the segment	Travel fulfils an inner drive to challenge themselves and extend their appreciation and understanding of other cultures
Profile	Compared to other long haul travellers in Japan, Self-Challengers: <ul style="list-style-type: none">• Are more likely to live in Tokyo or other Kanto areas• Are the most highly educated• Have the highest annual household income• Have more annual leave and are more likely to take longer holidays• Have a wide range of interests, which are more likely to include reading books, attending cultural events and educational courses, cycling, backpacking and going to bars• Are more likely to own a Visa card• Are more likely to be aged between 45 and 54 years
Approach to long haul travel	<p>Self-Challengers live to travel. They are keen to immerse themselves in the destination. They welcome the challenge of the unknown and look to educate themselves through new and different experiences, including improving their command of the English language. Their confidence as travellers draws them to un-touched locations, avoiding the tourist trail where possible.</p> <p>They are not affected by rational barriers in the same way as other travellers. Their holidays are driven by self discovery of different cultures and experiences, not a pre-occupation for luxury and comfort. As a result, they are less risk averse and are not as susceptible to typical marketing campaigns.</p>
Australia as a destination	<p>Australia is a very appealing proposition to Self-Challengers. They are more likely to have visited Australia and are also more likely to return.</p> <p>Many aspects of the Australian product interest Self-Challengers. They are more likely to be interested in the opportunity to learn about the indigenous culture, interact with the locals and work on their English. The opportunity to explore the landscape and drive across the country enthral them – particularly the opportunity to visit and explore undiscovered locations yet to be touched by tourists.</p>
What inspires them?	<p>When deciding where to go on their next holiday, Self-Challengers are more likely than other long haul travellers to be inspired by:</p> <ul style="list-style-type: none">• Friends, colleagues or relatives who either live at the destination or have been there• TV documentaries• Magazine articles• Internet sites or blogs including online newsletters• Tourism offices• History books or novels <p>Moreover, they are less susceptible to the influence of travel agents and brochures.</p>

“I remember when I went to America, the local people actually let me join to play basketball with them. That would just never happen in Japan.” Male, 26

“I went on a journey on my own with a compass. I rented a camel and employed a local part-timer”
Male, 31

How do I reach them in the Media?:

Self-Challengers media preferences include:

- They spend less time per day watching TV
- They spend the most amount of time using the internet for non-work purposes. When using the internet they are more interested in sourcing travel information as well as email and instant messaging. Yahoo Japan is the most used site, however Self-Challengers are more likely to use HIS, Chikyu-no-Arukikata and AB Road.
- In terms of print media, Self-Challengers have the greatest interest in the international news sections of newspapers and are more likely to read foreign language magazines. Magazines that are more popular among this segment include National Geographic and AB Road as well as a wide selection of travel guides. Some of the more popular newspapers include Asahi Shimbun and Nihon Keizai Shimbun.
- One in every four Self-Challengers does not listen to the radio. This is a higher proportion than among other segments. However, they are more likely to listen to J-Wave

Planning timeline

Self-Challengers begin the planning process closer to the departure date than other travellers, however they make flight and accommodation arrangements at similar stages to other long haul travellers.

- Start planning: 17 weeks before departure
- Book flights: 9 weeks before departure
- Book accommodation: 8 weeks before departure

Planning sources

Self-Challengers are more likely to use online sources or deal directly with the supplier when planning flights and accommodation. Moreover they are less likely to use traditional sources such as travel agents (although 55% use travel agents for arranging accommodation and 31% for flight availability).

Travel Profile

On a long haul holiday, Self-Challengers:

- Are the most likely to travel alone
- Have a higher average length of stay
- Are more likely to stay with friends, at a backpacker hostel or budget hotels/motels
- Have more annual leave entitlements

They are less likely to travel as part of an organised tour or stay at an all-inclusive resort. Self-Challengers also have a lower daily spend than other long haul travellers.

Holiday activities

Self-Challengers have a wide range of interests and are more likely than other travellers to plan their holidays around:

- Cultural events
- Backpacking
- Visiting friends
- Extreme sports

They are more likely to immerse themselves in a location. They are interested in shopping at local markets and trying local foods as well exploring the backstreets and natural surroundings outside the city centre. They also like to visit museums and art galleries.

Long haul destinations (other than Australia) they would really like to visit / seriously consider going to

Other long haul destinations of interest include:

- USA
- Germany
- Hawaii
- UK
- France
- New Zealand
- Canada
- Switzerland
- Italy

Cultural Explorers

"I love people-watching. You can be exposed to how Thai people live. You can sense them with your heart. It's not fun just going, seeing, and spending. I want more" Female, 61

Segment highlights

Segment size	4.3 million long haul travellers / 18% of the long haul market
Heart of the segment	Travel fulfils their desire to understand other cultures and people while not exposing them to the challenges of exploring a destination on their own.
Profile	Compared to other long haul travellers in Japan, Cultural Explorers: <ul style="list-style-type: none">• Are more likely to be older, married and retired• Have the smallest household size and are the least likely to have children living at home• Have the highest holiday budget per person• Have a wide range of interests. They are less interested in shopping, but are more interested in gardening, cultural events, hiking and educational courses
Approach to long haul travel	<p>Cultural Explorers want to enjoy the experience of a destination, without forgoing the luxury and comfort that they are accustomed to.</p> <p>They do not view a holiday as a reward and are less interested in relaxing and spoiling themselves. When travelling, they want to experience the true nature of a destination, however lack the confidence to do this on their own, hence their interest in group travel. They choose holidays that will meet their desire to see the cultural wonders of the destination without missing the tourist landmarks along the way. As such, they are open to influence from a variety of sources.</p>
Australia as a destination	<p>Cultural Explorers view Australia in a similar manner to other long haul travellers. The perceptual barriers of distance and lacking the history of a destination such as Europe are attitudes also held by the broader market.</p> <p>Cultural Explorers are less likely to have friends to visit in Australia.</p>
What inspires them?	<p>When deciding where to go on their next holiday, Cultural Explorers are more likely to be influenced by more traditional sources such as travel agents and newspaper articles.</p> <p>Given the average age of Cultural Explorers, their children are more likely to play a role in influencing their travel destination. They are less likely to use the internet.</p>
How do I reach them in the Media?	<p>Cultural Explorers media preferences include:</p> <ul style="list-style-type: none">• They spend the most amount of time per day watching TV. NHK is the most popular TV channel among this segment while they are more likely to be interested in documentaries, holiday & travel, food & cookery programmes. They are less likely to watch comedy programmes.• They are the most likely to read newspapers. The Asahi Shimbun is the most popular morning publication among Cultural Explorers and they are more likely to always read the local and international news sections as well as the politics section. Among afternoon publications The Asahi Shimbun and Mainichi Shimbun are more popular among Cultural Explorers. They are the most likely to read all sections of the newspaper.

“I think knowing authentic things is an important thing. It’s not because you can brag to your friends about it, but to know that you have actually had a genuine experience can just lead to more confidence and you can build firmer ground for yourself.” Male, 49

How do I reach them in the Media? <i>(continued)</i>	<ul style="list-style-type: none"> • They are the most likely to read travel magazines. Other genres of magazines that are more popular among Cultural Explorers include gardening, news and stock market publications. • Most Cultural Explorers have access to the internet at home, however they are the least likely to use it for non-work purposes. The most popular use is for email. 															
Planning timeline	<p>Cultural Explorers begin the planning process at a similar point to other travellers, however they make flight arrangements closer to the departure date than other segments of the Japanese market.</p> <ul style="list-style-type: none"> • Start planning: 18 weeks before departure • Book flights: 8 weeks before departure • Book accommodation: 8 weeks before departure 															
Planning sources	<p>Cultural Explorers are more likely to plan their holidays using traditional mediums. They are more likely to book flights and accommodation using local or national travel agents and are less likely to use the internet.</p> <p>Cultural Explorers are also more likely to have accommodation arranged for them as part of a package.</p>															
Travel Profile	<p>On a long haul trip, Cultural Explorers are more likely to:</p> <ul style="list-style-type: none"> • Travel as part of an organised tour and in a larger group • Have a higher average length of stay at a destination • Stay at luxury hotels • Spend more on their holiday, both per day and overall • Have taken long vacations in the past <p>In addition, Cultural Explorers are less likely to travel with their children or stay with friends.</p>															
Holiday activities	<p>While less interested in more physical and exerting activities, Cultural Explorers have a wide range of activities they like to do while on holiday including eating at restaurants, visiting local markets, travelling around the country, exploring the backstreets and going on guided tours.</p> <p>More specifically, Cultural Explorers are more likely than other long haul travellers to:</p> <ul style="list-style-type: none"> • Visit famous landmarks/historic sites • Visit museums and art galleries • Visit national parks / gardens • Attend cultural events <p>Furthermore, Cultural Explorers are less likely to shop in the city/malls or self drive around the destination.</p>															
Long haul destinations (other than Australia) they would really like to visit / seriously consider going to	<p>Other long haul destinations of interest include:</p> <table border="0"> <tr> <td>• France</td> <td>• Switzerland</td> <td>• Italy</td> <td>• Germany</td> <td>• Canada</td> </tr> <tr> <td>• Canada</td> <td>• New Zealand</td> <td>• Hawaii</td> <td>• USA</td> <td>• Austria</td> </tr> <tr> <td>• United Kingdom</td> <td>• Egypt</td> <td>• Turkey</td> <td></td> <td></td> </tr> </table>	• France	• Switzerland	• Italy	• Germany	• Canada	• Canada	• New Zealand	• Hawaii	• USA	• Austria	• United Kingdom	• Egypt	• Turkey		
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• Canada	• New Zealand	• Hawaii	• USA	• Austria												
• United Kingdom	• Egypt	• Turkey														

Travel in Style

"I want to escape from everyday life, such as stress from work and complicated relationships with others. I want to be at a place different from my everyday life." Male, 35

Segment highlights

Segment size	5.5 million long haul travellers / 23% of the long haul market
Heart of the segment	Superior holiday experiences that involve very little effort.
Profile	<p>Compared to other long haul travellers in Japan, Travel in Style:</p> <ul style="list-style-type: none">• Are more likely to work full time• Have the largest average household size• Are the most likely to have children living at home• Have a higher than average household income• Consider taking longer vacations• Have a range of interests that are more likely to include shopping, winter sports, diving and water sports and are less likely to include reading books• Are more likely to be aged between 35 and 44 and less likely to be over 55 years of age
Approach to long haul travel	<p>Travel in Style love to travel, and they know exactly what they want to get out of the experience.</p> <p>In many cases, holidays are seen as a reward. As such, they want to be taken care of – with a great deal of comfort and very little effort on their part. They shop around for holidays that represent good value for money. They also need to consider other factors including their children’s needs and spending time with their family.</p> <p>They like to shop when travelling, taking advantage of shopping trips organised for them. They also look to follow the tourist trail, picking up mementos along the way.</p>
Australia as a destination	<p>Australia is seen quite favourably, with those who have visited being more likely to return than those from other segments of the Japanese market.</p> <p>Australia’s beaches, vibrant cities, range of activities and shopping (particularly for local mementos) are key drivers for Travel in Style travellers looking to visit Australia.</p> <p>The rational barriers of distance and the expense associated with visiting Australia are present among this segment, however to no greater extent than among the remainder of the Japanese market.</p>
What inspires them?	<p>When deciding where to go on their next holiday, Travel in Style are more likely to be inspired by:</p> <ul style="list-style-type: none">• Travel agents and brochures• Internet travel sites <p>Moreover, Travel in Style are less likely to be inspired by history books than other travellers.</p>

“I have this image of Australia that it’s a place where you go to see beautiful fish and ocean when you want to refresh yourself from all the stress.” Female, 35

How do I reach them in the Media?

Travel in Style’s media usage is consistent with that of the overall long haul travel market from Japan.

They are average users of radio, television, newspapers and the internet and tend to consume the same publications and channels as other long haul travellers. Some specific differences in the Travel in Style segment include:

- They are less likely to always read the international news section of newspapers
- Travel in Style are the least likely to read magazines, specifically gardening magazines
- The overwhelming majority of Travel in Style read travel guides. They are more likely than other travellers to read Chikyu-No-Arukikata
- While moderate radio listeners, they are less likely to listen to NHK – Daiichi and NHK – FM
- In terms of TV interests, they are more likely to watch soap operas, comedy and cartoons than other long haul travellers
- They go to the cinema less often than other long haul travellers

Planning timeline

Travel in Style begin the planning process later than other long haul travellers, however they make flight and accommodation arrangements at a similar stage to other travellers.

- Start planning: 17 weeks before departure
- Book flights: 9 weeks before departure
- Book accommodation: 8 weeks before departure

Planning sources

They are likely to use more traditional sources to plan their holidays. They are more likely than other long haul travellers to make plans through travel agents by visiting them in person.

Travel Profile

On a long haul trip, Travel in Style are more likely to travel with their partner or children. However they:

- Are less likely to travel as part of an organised group tour
- Travel for shorter periods of time
- Spend less on their holidays

Holiday activities

While having a wide range of interests, Travel in Style have specific interests when they go on long haul holidays. They are more likely to plan their holidays around:

- Sunbathing/walking along a beach
- Shopping for famous/local brands
- Diving
- Sailing
- Child friendly activities
- Snorkelling
- Visiting health spas
- Winter sports

In contrast, they are less likely to visit famous landmarks or tourist sites.

When on holiday, they are more likely to:

- Shop in cities/malls
- Relax by the beach/pool
- Participate in water sports

Long haul destinations (other than Australia) they would really like to visit / seriously consider going to

Other long haul destinations of interest include:

- USA
- Canada
- France
- Switzerland
- Italy
- Pacific Islands
- Hawaii

Collectors

“I usually get an idea of when I want to go by looking through catalogues and calendars. Once I decide on the month when I want to go, I just gather up as many brochures as possible, and I look for tours that offers suitable itineraries and dates.” Female, 25

Segment highlights

Segment size	5.0 million long haul travellers / 21% of the long haul market
Heart of the segment	An all inclusive holiday experience in as short a time as possible.
Profile	Compared to other long haul travellers in Japan, Collectors: <ul style="list-style-type: none">• Are more likely to have children living at home• Are less likely to be aged 18 to 24• Have a range of interests which are more likely to include golf and less likely to include listening to music or reading books• Are more likely than other segments to own and use a JCB credit card
Approach to long haul travel	<p>Collectors are not natural travellers. They do not look to challenge themselves when travelling, preferring to have everything done for them while seeing everything in as short a period as possible.</p> <p>They are very susceptible to the influence of travel agents and advertising. They are looking for destinations that are safe, with the opportunity to shop and enjoy the creature comforts of home such as having a Japanese tour guide. They are not averse to being a tourist while on holiday and enjoy the luxury that this affords them. They are less likely to visit family or friends when travelling.</p>
Australia as a destination	<p>Collectors are less likely to have visited Australia before.</p> <p>They are the least likely to have friends or family to visit and do not exhibit any drivers other than those shown by the long haul travel market in general.</p> <p>There is a certain degree of uncertainty as to what Australia can provide to travellers. It is also seen as too far away and inconvenient to get around.</p>
What inspires them?	<p>Collectors are more likely than other long haul travellers to get inspiration from travel agents and brochures/advertising.</p> <p>In contrast to this, they are less likely to be inspired by:</p> <ul style="list-style-type: none">• Magazine articles• Travel sections of publications• Internet travel sites• TV travel programmes• Movies• Documentaries
How do I reach them in the Media?	<p>Collectors consume more traditional media than the average long haul traveller. They are less likely to use the internet or listen to the radio. They are average television watchers and are more likely to read magazines.</p> <ul style="list-style-type: none">• They are less likely to read Asahi Shimbun and tend to always read the TV guide and Japanese news sections of the newspaper. A quarter of this segment never read the business or sports sections

“I’ve never been to Australia, but it seems like there are many places that you can go to when you look for information. Sydney seems metropolitan, there is that one rock, and there are deserts too. I’d like to go, but I don’t know which would be a good place to visit.” Female, 43

How do I reach them in the Media?
(continued)

- They are the least likely to read foreign language magazines
- They are less likely than other long haul travellers to read Chikyu-No-Arukikata travel guides
- While less likely to use the internet for non-work purposes, Collectors are more likely than other travellers to visit Goo, JTB and Nippon Ryokou websites

Planning timeline

Collectors begin the planning process earlier than other long haul travellers. Furthermore, flight and accommodation arrangements are made earlier than other travellers.

- Start planning: 19 weeks before departure
- Book flights: 9 weeks before departure
- Book accommodation: 9 weeks before departure

Planning sources

Collectors are more likely to use traditional sources for planning their holidays. They are less likely to book flights and accommodation through the internet and are more likely to book accommodation through a travel agent they have met with.

Travel Profile

On a long haul trip, Collectors are more likely to:

- Travel with friends
- Travel for only 4 days
- Stay in moderate hotels
- Have a higher daily spend

Furthermore, Collectors:

- Are the least likely to travel alone
- Are less likely to travel for more than 2 weeks
- Have a lower total spend
- Are likely to not have taken as long a holiday as other segments of the Japanese market

Holiday activities

Collectors are more likely to plan their holidays around shopping for famous brands. In contrast to this, they are less likely to plan their holidays around:

- Shopping for local specialities
- Photography
- Cultural events

When travelling, Collectors are less likely to:

- Shop in local shops/supermarkets
- Sample the local cuisine
- Explore the backstreets
- Spend time with friends

Long haul destinations (other than Australia) they would really like to visit / seriously consider going to

Other long haul destinations of interest include:

- Hawaii
- France
- Italy
- Canada
- Germany
- USA
- Switzerland
- Germany
- New Zealand

First Timers

“Traveling somewhere abroad has always been an allure to me, but I had always been reluctant to go because of on-going world affairs and airplane crashes etc. My motivation to go abroad arose after making a first big trip to Hokkaido. It required a lot of courage to go for a really lavish trip that cost me 350,000 yen.” Male, 22

Segment highlights

Segment size	3.6 million long haul travellers / 15% of the long haul market
Heart of the segment	A desire to see the world, but lack the confidence or know how to do it on their own.
Profile	Compared to other long haul travellers in Japan, First Timers: <ul style="list-style-type: none">• Are virtually all aged under 35• Are more likely to be single and living with their parents or on their own• Are more likely to be students• Are the least likely to be living in Tokyo• Have the lowest annual household income• Have less annual leave and are less likely to take 5 days in one go• Have a wide range of interests which are more likely to include Karaoke• Are more likely to not own a credit card
Approach to long haul travel	<p>First Timers are defined by their inexperience. They lack any confidence when it comes to travel and are concerned with the practicalities of it.</p> <p>They have a healthy curiosity and are interested in learning about destinations and cultures outside Japan, but lack the confidence to go and experience it. This leads to their preference towards group travel.</p> <p>Travel is often seen as a reward and should involve an element of luxury. Hence they generally try to use this experience to have an adventure and try something different to the life they know.</p>
Australia as a destination	<p>First Timers are less likely than other long haul travellers in Japan to have visited Australia. Moreover, they are less likely to seriously consider visiting Australia in the future.</p> <p>Any interest in Australia is driven by similar factors to the rest of the long haul market including their curiosity of the people and the Australian lifestyle. Their knowledge of Australia is limited, with uncertainty as to what they would do in Australia. As is the case among other travellers, many feel it is too far away and very expensive.</p>
What inspires them?	<p>When deciding where to go on their next holiday, First Timers find inspiration from similar sources as other long haul travellers from Japan.</p> <p>Notably, First Timers are more likely to be inspired by i-mode than other travellers. Other forms of inspiration more common among this segment include:</p> <ul style="list-style-type: none">• Online newsletters• Radio programmes• Posters/billboards

“I want to see other parts of the world” Male, 20

“I’d like to touch koalas, and I’d like to drive around a Jeep through a desert if I were to go to Australia. I’d also like to take a picture of a sign that says ‘Watch out for kangaroos’ because you would never see that in Japan.” Male, 20

How do I reach them in the Media?

First Timers media preferences include:

- Across all media, First Timers are less likely to be interested in travel and leisure publications.
- They are the least likely to read either morning or evening newspapers. Readership of all sections is lower than average, however this is particularly the case for the leisure section. They are more likely to read the society pages.
- They read a variety of magazines which are more likely to include fashion, film or music and job advertisement magazines. In contrast, they are the least likely to read travel magazines. Orange Page is one magazine publication that is more popular among this segment. Other popular publications include Rurubu, Jaf Mate and Josei Jishin. They are the least likely to read AB Road
- In terms of TV preferences, they are more likely to watch comedy, music or cartoons and less likely to watch news and current affairs programmes. Daytime television is also more popular among this segment.
- First Timers use the internet considerably, particularly for playing games. They are also more likely to access the internet at a range of locations including their home, their friends homes, at school or by phone. They use the internet to access email and buy products in a similar propensity to other segments, however they are more likely to use it for educational activities and watching TV/videos

Planning timeline

First Timers begin the planning process earlier than other long haul travellers. However, accommodation arrangements are made later in the planning process when compared to other long haul travellers.

- Start planning: 21 weeks before departure
- Book flights: 8 weeks before departure
- Book accommodation: 8 weeks before departure

Planning sources

First Timers are more likely to book accommodation through a travel agent they have visited. Moreover, they are more likely to book all accommodation in advance and less likely to have it included as part of a package.

Travel Profile

On a long haul trip, First Timers are more likely to:

- Travel as part of a school group
- To either travel for only 4 days, or for more than two weeks
- Stay at an all-inclusive resort or B&B/guest house

Conversely, they have a lower daily spend and a lower total holiday spend than other travellers, and have less annual leave available to them.

“I really wanted to go to Australia then because I saw pictures of my friends’ honeymoon, and I was intrigued to go to the Green Island. I also want to go see the Great Barrier Reef and you know, the great nature– not like farms but more like National Parks. Oh, and I really want to hold koalas!” Female, 31

Holiday activities

First Timers are more likely to plan their holidays around:

- Events/festivals
- Camping
- Watching sports events
- Cycling

They are less likely to plan their holidays around cultural events.

When travelling, First Timers are more likely to:

- Spend time with friends by holidaying together
- Get to know the locals

Conversely they are less likely to eat in restaurants, shop for local products and visit historic sites.

Long haul destinations (other than Australia) they would really like to visit / seriously consider going to

Other long haul destinations of interest include:

- Hawaii
- USA
- Canada
- New Zealand
- Italy
- France
- UK
- Germany



Identifying Australia's most valuable target markets

Of the five segments identified in the Japanese travel market, Self-Challengers and Cultural Explorers are the segments that Tourism Australia has identified as core targets within this market.

These two segments clearly have the greatest potential to generate income for Australian tourism and deliver a good return on our marketing investment. In addition, Self-Challengers and Cultural Explorers have the greatest potential to travel to Australia in the short to medium term.

For all these reasons, Tourism Australia believes Self-Challengers and Cultural Explorers represent the most suitable target segments in the Japanese market to achieve sustainable growth in Australian tourism.

Reaching these two segments will be a core objective of Australia's communication target in the Japanese market.

What about other segments?

You may be wondering what this means for the other three segments; Travel in Style, Collectors and First Timers. Members of these segments will still visit Australia and may well be appropriate targets for parts of the Australian tourism industry.

There is the opportunity to bridge current barriers and enhance the drivers exhibited by these segments by enhancing awareness and educating the Japanese long haul market of the Australian offer. This will assist in creating a buzz about Australia as a dynamic, energetic destination that is a must visit.

We can see from the various attributes of the First Timers, that as they become more experienced and interested in long haul travel, they will move along the experience continuum to join other segments of the market. This is one example of how any marketing activities targeted at Self-Challengers and Cultural Explorers (or Experience Seekers) will have a flow on affect to the other segments.

Travel in Style travellers are an important segment of the market. While they will not be a key focus for national tourism, this lucrative segment offers a potential opportunity for parts of the Australia tourism industry because:

- They represent a sizable section of the long haul market with a high propensity indicating they would seriously consider visiting Australia
- Are good yield prospects

Further information

This document is one component of a suite of documents Tourism Australia has produced for the Japanese target market.

For a broad snapshot of the Japanese travel market, please refer to:

- Australia's understanding of the Japanese travel market

To understand the global communications target market that Tourism Australia is concentrating on, please refer to:

- Australia's global communications target: the Experience Seeker

For more information on how the Experience Seeker communications target relates to the Japanese segmentation information in this document, please refer to:

- Experience Seekers in Japan – understanding Experience Seekers in the Japanese market

These documents are available on the Tourism Australia website. Moreover, for any further information you require, please visit the Tourism Australia website at www.tourism.australia.com, or contact your local Tourism Australia office.

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