

JAPANESE TOURISM OPPORTUNITIES

ON CALM LANDS AND WATERS

KEIKO SASAKI

PARK POLICY & TOURISM BRANCH

JULY 1997

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CONTENTS

- 1.0 RECOMMENDATIONS**
- 2.0 JAPANESE MARKET**
BRIEFING NOTES ON JAPAN
- 3.0 RESULTS OF JAPANESE TOUR OPERATOR'S SURVEY**
QUESTIONNAIRE SHEET
- 4.0 RESULT OF JAPANESE TOURISM SURVEY**
QUESTIONNAIRE SHEET
- 5.0 SCHOOL EXCURSION**
HILLS FOREST EXCURSION PROGRAM
JAPANESE OVERSEAS SCHOOL EXCURSIONS
MARKETING FACT SHEET
(Prepared by Australian Tourist Commission)
- 6.0 PROPOSED SPECIAL PROGRAMS FOR CALM**
- 7.0 CALM's SITES REPORTS**

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Recommendations

Information & marketing

- (1) Have a good relation with Mr. Takata, who is manager of WATC (Western Australia Tourism Commission) office Japan, as WATC Japan is a good resource to release nature-based tourism information. Thus, I do recommend Colin to meet with Mr. Takata, when he visits Perth next time. Prior to his visit, he may write a letter to him.
- (2) Provide CD ROM to Western Australia State Office (Tokyo and Kobe), WATC and ATC (Australia Tourism Commission) for their reference.
- (3) Create a Guidebook (pre-visit information), which is consisted of introduction of major national parks (or nominate potential parks), as well as activity information, with maps. If possible, it can be translated into Japanese and/or other foreign languages. Then, guidebooks could be delivered through WATC Japan and other foreign offices.

Alternatively, if no budget is available for the above, CALM could send a package of information to WATC Japan office.

- (4) If such an opportunity exists and a budget is available, Dr. Shea or any other representative from CALM may conduct a nature-based tourism presentation in Japan towards Japanese outbound tour operators and media, using the CD ROM. It can be associated with WATC and Western Australia State Office.
- (5) Improvements to Signage.

Program Development

- (6) Target school excursion programs to promote CALM's various activities in Japanese/Asian markets. Please refer to the attached excursion program at Hills Forest.

In addition, it might be interesting to prepare CALM's special programs to target silver aged people (50 years and over). Please refer to the attached recommendation.

- (7) CALM's marketing section takes up the recommendations in the report and assist in implementation of recommendations.
- (8) Circulate the report for comment and information.

Research

- (9) Conduct similar survey (Japanese inbound tour survey) to Japanese outbound tour operators in Japan and have opportunities to promote CALM's locations and activities.

JAPANESE MARKET

1. Japanese Market Trend

According to the statistics released by the Ministry of Justice, Japan, the Japanese outbound travel increased by 12.7% to 15,298,125 travellers in 1995. Despite the negative effects expected from the Great Hanshin Earthquake in January 1995, the Japanese travel market performed comparatively well. It was mainly attributed by the high appreciation of the Yen against the US dollar. And such appreciating yen encouraged travel overseas as shopping, dining and optional tours were "reasonably priced".

As seen in the table below, the USA and Asian nations continue to dominate the top ten destinations. The USA which includes Hawaii (Japan's top overseas destination) and Guam (a small island in Micronesia, takes about 4 hours from Japan) attracted over 31% of overall Japanese outbound travellers or 4,753,770 visitors in 1995.

Australia (744, 376 travellers) improved its rank to sixth, from seventh in 1994. Australia has also overtaken Singapore since 1991, and maintained percent share of approx. 5%.

Top Ten Destinations

Rank	Destination	Percentage	Rank
1	USA	31.1	1
2	Korea	10.2	2
3	Hong Kong	7.6	3
4	China	5.7	4
5	Taiwan	5.3	5
6	Australia	4.9	7
7	Singapore	4.8	6
8	Thailand	3.9	8
9	United Kingdom	2.6	10
10	Italy	2.4	12

Source: Ministry of Justice, Japan

During 1995, 82.9% of Japanese (12,685,155) travelled overseas as a tourist, while 13.5% (2,065,990) travelled for business purposes. The remaining 546,980 travellers stated other reasons such as study/research, technical training, accompanying spouse, diplomats or overseas assignments for travel.

Over 55% or 8,441,464 of Japanese travellers spend less than 6 days abroad. Travellers spending up to 10 days abroad accounted for 29.5% of the total. Males accounted for 56.6% and females for 43.5% of the total.

Several Japanese travel agents stated that, the average length of stay in Australia is 4 to 7 nights. The average length of stay in Perth would be approximately 2 to 4 days. That's why, many tourists stick in the city and may perhaps visit Pinnacles or other destination as a day trip.

According to the statistics, released from the Western Australian Tourist Commission, 782,000 Japanese tourists arrived to Australia in 1994/95, compared with 721,000 in 1994. And 46,500 Arrivals to Western Australia, which is equivalent to 5.9% of the total arrivals to Australia. This represents 9.6% of the total international visitors to Western Australia. Following is visitor numbers in recent years.

<i>Year</i>	<i>Total visitor numbers to WA</i>
1992/93	28,000
1993/94	30,700
1994/95	46,500
1995/96	52,400

Source: International Visitor Survey
(The Bureau of Tourism Research in Canberra)

2. Japanese attitude towards travel

It seems that people are getting more value conscious and more price conscious. Lots of travellers might have experienced visiting Europe and the US including Hawaii. They wonder what is next?

There are approximately two attitudes under this circumstance. Mr. X might think this way; "well, I have a budget of \$1,000 and a holiday period of one week, so shall I go to Hawaii again or any destination within the budget." In this case, he does not mind any destination, if a budget and travelling period would suit him:

But, Miss. Y might say that; "I have special interests for this destination, so I dentately want to go there." She may still care about the budget, but, it can be more flexible:

Tour Package

Above mentioned budget of approximately \$1,000 (Yen 100,000) would be probably very popular tour price as overseas package tour deal in these days. With a budget of approximate \$1,000, you might be able to visit Hawaii or Asian countries. With a little bit over \$1,000, it could cover the tour to the West Coast of the US (Los Angels, Las Vegas and San Francisco) or even to Europe (probably London, Paris and Rome). And those costs include airfare and accommodation.

While, an average cost of touring Australia (Sydney, Ayers Rock and Perth) would be approximately \$2,500 or more. (please refer to copies of some JAL pack leaflets, for your information.) In spite of the above cheap package prices, this cost is rather expensive.

Airfare Only

In terms of airfares, again the return flights between Japan and Australia is relatively expensive, compared to fares to the US and Europe.

For example, a Tokyo - Sydney discount ticket by Quanta's costs about \$1,000 return, the same as a ticket to Paris or Rome, and about 30% more than a return ticket to Hawaii (Japan's top overseas destination) or the US West Coast. The Australia - Japan route is now one of the most costly in the world. Therefore, competitiveness is also fairly weak.

Above mentioned Mr. X's type is majority among Japanese travellers, but, Miss. Y, who has special interests would be more suitable for Western Australia.

How they choose destination/tour?

A survey conducted in 1995 by Japan's biggest consumer travel magazine, called "AB-ROAD", questioned Japanese tourists returning from overseas about their experience in more than 100 destinations. As a result, they rated Perth as the second most satisfactory destination in the world after *Banff in Canada*. The aspects of Perth most enjoyed by these Japanese visitors were the friendliness of the people, the beaches, and the safety aspect. In particular the Pinnacles rated highly.

According to the same "AB-ROAD" survey, it shows that the most popular key factor choosing destination is "*Publicity*", followed by "*Word of Mouth Recommended by Friends*". Result of survey follows.

Publicity in Consumer Travel Magazines		36.2
Publicity in General Magazines		27.7
Repeating Visit		12.8
TV Exposure		17.0
Word of Mouth Recommended by Friends		31.9
Book/Novel		8.5
Recommended by Partner		12.8
Recommended by Travel Agency		2.1
Others		25.5

Source: Consumer Travel Magazine "AB ROAD"

Holidays in Japan

There are three major holiday periods, i.e., the New Year, August's *O-Bon* (Buddhist Festival of Souls) break and the Golden Week holidays (with its several public holidays). Especially, the Golden Week holidays are extremely popular for overseas travel.

The New Year holiday, basically, starts on December 30 and continues to January 4. Only January 1 is the National Holiday, called "*Ganjitsu* (New Year Day). But, companies may

close their offices from the end of December to the beginning to January (it varies with companies and calender of the year), usually it lasts for 6 to 7 days including weekends.

As Golden week holidays, usually, workers could enjoy approximately whole 10 days' vacation, while only needing to take 4 days' annual leave, as April 29 and May 5 are both National Holidays, called "*Midori-no-Hi* (Greenery Day)" and "*Kodomo-no-Hi* (Children's Day)," receptively, with two conveniently-spaced week-ends as well. Some companies might offer consecutive 10 days' vacation for their employees.

No National holidays exists during August's *O-bon* break. However, most of companies usually close their offices in the middle of August (e.g., in 1997, August 14 though 17) for this particular timing. It lasts for 4 to 5 days including weekends.

School Holidays

Japanese school fiscal year starts in April and ends in March, next year. There are three school holiday periods, i.e., summer, winter and spring holidays. Summer holiday usually starts from July 20 and ends on August 31, which is the longest holiday period. Winter holiday is usually between December 20 and January 4. Spring holiday is for March 20 through April 10.

For your information, Japanese school system follows.

Kindergarten	3 grades (3 to 5) Not compulsory.
Elementary school	6 grades (6 to 12) Compulsory
Junior high school	3 grades (13 to 15) Compulsory
High school	3 grades (16 to 18) Not compulsory
University	4 grades (18 to 22) Not compulsory

General expectation/attitude towards overseas trip

Japanese tourists may expect extraordinary, exciting and foreign experience for overseas trip, although the most popular activity is sightseeing. They want to see spectacular and/or dynamic senary.

Japanese tourists have tendency to have busier schedule and prefer multi-destinational travel in a limited time. An overseas travel trend towards more inexpensive holidays of shorter duration. According to WATC (West Australian Tourist Commission), the average Japanese visitor spends \$1,602 per trip.

In comparison with key competitors, Australia is perceived as a place where holidaymakers can relax physically and mentally by either undertaking no activities or conversely by being active and adventurous. It shares with Hawaii (Japan's top overseas destination) those aspects of a beach resort oriented holiday. However, Australia offers more "foreign experience".

The FIT (Free Individual Traveller) market is increasing, it sill makes up less than 10% of the Japanese outbound market. 90% of travellers use travel agencies, and travel agencies use inbound tour operators. The Japanese FIT traveller does not have the same travel habits as the European FIT or backpacker who confidently arrives in a destination with a completely unstructured itinerary. It would be mostly attributed by the language barrier. So the language barrier is a critical issue.

Japan is an ageing country. By 2000, almost 40% of overseas travellers will be aged over 50. Thus, I believe that such "silver" segment is very important. It recommends targeting the growing mature aged travellers of 50 years and over.

Source: Japan Industry Presentation (by Mr. Takata, manager Japan, WATC),
Japan Fact Sheet (prepared by WATC),
Perth Times,
The Japan Australia News

3. Western Australia

What is Western Australia for Japanese people? Negative and positive attributes for Perth and Western Australia follow.

Negative attributes;

- Air fare (between Australia and Japan) is expensive, compared with return fares to/from Europe and the US
- Domestic air fare is also very expensive.
- Limited direct flights from Japan to Perth (3 flights per week only from Tokyo).
- No direct flights available from other areas including Osaka.
- Western Australia is isolated from Eastern States.
- Less cultural and artificial expression, i.e., museums and theatres.

Positive attributes:

- Safety
- People are usually friendly.
- Capital city, Perth is modern and vibrant
- There are nice beaches and enough sunshine in summer period. (On the contrary, Japan is in winter at that timing.)
- There is minimal time difference.
- Wide open spaces
- There are lots of Unique flora and fauna.
- Vast, easy-accessible Natures and natural beauty.
- Superb marine activities (diving, snorkelling and swimming)

I believe the most characteristic feature of Western Australia is the Nature, including flora, fauna and marines. Real natural beauty exists in this country. Therefore, it should be more promoted and marketed efficiently.

Source: 1995 AB-Road Survey
Japan Industry Presentation (by Mr. Takata, manager Japan of WATC)

Briefing notes on Japan

General information

Land area: 374,744 square km

Capital: Tokyo

Climate: Generally temperate with seasonal-winds and typhoons in early autumn, warm and humid in summer. Relatively mild winters, although there is heavy snow on the Japan Sea Side.

Time Zone: AEST minus one hour.

Language: Official language - Japanese
Commercial language - Japanese

Government: Japan is a Constitutional Monarchy, which with a basically Westminster pattern of Government - two popularly elected houses in the Diet (House of Representatives - Lower House, and House of Councillors - Upper House). The Prime Minister is elected by the Lower House and then appointed by the Emperor. The Prime Minister appoints the Cabinet, the majority of whose members must also be members of the Diet. The Cabinet is responsible to the Diet.

Head of State: HIM The Emperor (Akihito)
In the Japanese constitution, he is described as "Symbol of the State", and has no governing powers. His Imperial Majesty Akihito succeeded to the throne in 1989.0

Head of Government: H.E. Mr. Ryotaro Hashimoto

Business hours:

Government offices	09:00 - 17:00 (Monday to Friday)
Private Offices	09:00 - 17:00 (Monday to Friday)
Banks	09:00 - 15:00 (Monday to Friday)
Shops	10:00 - 19:00 (it varies with shops)

Currency: 1 Yen
A\$ 1 = Yen 85 or
US\$ 1 = Yen 112
as of June, 1997
The Yen is fully convertible.

Legal System: Modelled after European civil law system with English-American influence. There is judicial review of legislative acts in the Supreme court.

Population

In July 1995, Japan had a population of 125.5 million. This is projected to grow to 126 million by 2000.

The population is predominantly urban (77%). Tokyo is the largest city, with a population of 8 million (about 6.4% of the total population).

In October 1995, the Japanese labour force was 67.1 million. Japan has an unemployment rate of 3.2%.

16% of the population are aged between 0-14 years; 69% between 15 and 64 years; and 15% are 65 years or more. Average life expectancy in Japan is 79.4 years.

20% of Japanese households have assets above US \$360,000.

Adult literacy is 99%.

84% of the population observe both Buddhism and Shitorism. 0.7% of the population are Christian.

There were 44.2 million households in July 1995, with the average size being 3.5 persons per household.

2.85 million people visited Japan in 1994, 61% of these were from Asia and the Pacific.

Economy

Gross Domestic Product:	AS 6,194 billion (1995 - EIU estimate) (cf. Australia AS 500 billion - 1996 estimate)		
GDP per Capita:	AS 54,919/capita (1995 - EIU estimate) (cf. Australia AS 27,000/capita - 1996 estimate)		
Real GDP Growth Rate:	2.1%	1997	(EIU forecast)
	3.9%	1996	(EIU estimate)
	0.9%	1995	
Inflation Rate:	1.1%	1997	(EIU forecast)
	0.3%	1996	(EIU estimate)
	-0.1%	1995	
Unemployment Rate:	3.3%		(1996 - OECD estimate)
Number of Unemployed:	2.1 m		(1995)
Workforce:	64.5 m		(1994 - Tokyo Keizai estimate)

Department of Conservation & Land Management (CALM)

Japanese Tour Operators Survey

There are 9 Japanese inbound tour operators based in Perth, out of 26 inbound tour operators in total, according to Inbound Tour Operators Association. A list of such Japanese inbound tour operators is attached.

I have met and handed survey questionnaires to every Japanese inbound tour operator to have good relationship and have opportunities to discuss with them. And all of 9 companies replied to this survey, although two companies did not conduct any tours into national parks and reserves. However, approximately 80% of Japanese inbound tour operators do conduct nature based tours. According to those representatives, the most popular tour destination is PINNACLES (Nambung National Park), followed by Rottnest Island and Monkey Mia. In addition, dolphin swimming enjoys its popularity these days. Usually, Pinnacles is a part of optional tours, via Yanchep, and Monkey Mia for a part of package tour.

It seemed that most tour operators were satisfied with their tour into national parks/reserves. Basically, they understood and appreciated CALM's responsibility and assignments, although there were a few criticisms. (referring to the Question No.14 for further comments)

Every single tour operator stated that there is a language barrier, and CALM's publication does not fulfil Japanese tourists' requirements. All mentioned a need for translation into Japanese language. Tour operators would like to provide information in Japanese, and their customers appreciate receiving such information in Japanese. That's why, they pay fairly expensive tour costs.

They also mentioned a need for information that everyone can easily access, e.g., video and publications. Unfortunately, none of those interviewed showed an interest in CD ROM or Internet. I assume it because, such tools have not been still popular yet in the Japanese market.

The result of survey follows.

Q1. Do you conduct nature based tour for Japanese tourists into national parks and reserves?

7	2
78%	22%

Approximately 80% of Japanese inbound tour operators conduct nature based tours into national parks and reserves. According to the International Visitor Survey (1994) by the Bureau of Tourism Research in Canberra, the most popular place, visited by Japanese tourists was *National Parks, Reserves and Caves*, followed by *beaches* and *Zoos, Animal or Marine Parks*.

Q2 How many Japanese tours into national parks and reserves do you usually conduct?

3	1	2	1
43%	14%	29%	14%

Interviewed Japanese inbound tour operators are relatively big companies. For instance, JTB (Japan Travel Bureau) is the biggest travel agency in the world. That's why, some 43% of companies conduct tours once a day.

Q3 What is the average size of a tour into national parks and reserves?

1	1	1	1	1	2
14%	14%	14%	14%	14%	29%

Sizes of tour groups vary with companies and/or occasions.

Q4 Are the tours into national parks and reserves part of:

5	6	5	1
29%	35%	29%	6%

*Education/school trip

Package tours - A tour into national parks/reserves is already set in the tour itinerary/costs. Monkey Mia is often in this case.

Optional tours - A tour into national parks/reserves is excluding. Depends on the customer's choice, they can choose activities/destinations. The most popular destination as an optional tour is Nambung (Pinnacles).

Special interest tour - e.g., wildflower observation tour

Although education/school trip showed small percentage, I believe there is possibilities under this category. Please refer to my report of "School Excursions".

Q5 Which of the following national parks, reserves and other areas do you conduct tours into?

National Parks, Reserves and Other Areas		
Yanchep National Park	100%	Koalas, on the way to the Pinnacles
Penguin Island	29%	Penguins
Nambung National Park (Pinnacles)	100%	Unusual views, most popular place as optional tour
Ningaloo Marine Park	43%	Whale sharks
Monkey Mia	100%	Wild dolphins
Walpole-Nornalup NP (Tree Top Walk)	43%	Tree top walk

Every Japanese tour operator (all 7 operators) do conduct tours into Nambung National Park, via Yanchep National Park, as well as Monkey Mia. And three (3) companies conduct tours for Ningaloo Marine Park and Walpole-Nornalup National Park. Penguin island tour is conducted by two (2) companies.

How did they satisfy with the above national parks/reserves?

Satisfaction Levels					
Yanchep National Park	14%	43%	29%	0%	14%
Penguin Island	0%	50%	50%	0%	0%
Nambung National Park (Pinnacles)	14%	43%	29%	0%	14%
Ningaloo Marine Park	67%	0%	0%	0%	33%
Monkey Mia	29%	43%	14%	0%	14%
Walpole-Nornalup NP (Tree Top Walk)	67%	0%	0%	0%	33%

Including *very satisfied*, *satisfied* and *moderate satisfied*, approximately 90% of companies satisfied with their tours into Yanchep, Nambung and Monkey Mia. Some 67% rated as *very satisfied* with Ningaloo and Walpole. 100% of tour operators, who conducted tours into Penguin Island satisfied as *satisfied* or *moderate satisfied*.

Q6 Please refer to Attachment A, which lists national parks, reserves, areas and activities and indicate the five more important ones to your tour.

Rank	Score	Location	Activity
1	34	Nambung National Park	Pinnacles
2	19	Shark Bay	Monkey Mia, dolphins, shell beach & stromatolites
3	13	Yanchep National Park	Koalas
4	6	Ningaloo Marine Park	Whale sharks
5	5	Stirling Range	Wildflowers
6	4	Kalbarri National Park	Nature
6	4	Karri Forest	Karri forest
8	3	Walpole-Nornalup National Park	Tree top walk
9	2	Shoalwater Marine Park	Dolphin swim & Penguin island
9	2	Fitzgerald River National Park	Wildflowers & birds
11	1	Shannon National Park	Forests & birds

For your information; the highest possible score is 35.

As shown above, Nambung National Park is considered as the most important park. As the highest possible score is 35, it's 34 points was nearly full marks. Pinaccles is the best spot for the Japanese tourists.

Shark Bay comes next with the points of 19, followed by Yanchep National Park (13 points). Although Shark Bay is relatively far away from Perth, Monkey Mia, dolphins, shell beach and stomatolites attract the tour operators and tourists. Yanchep is, after all, featured by Koalas.

Ranking	Number of tourists	Activities
1	31	Sightseeing
2	24	Dolphin viewing
2	24	Wildflower viewing
4	5	Wildlife viewing
4	5	Diving and snorkelling
6	4	Whale watching
7	3	Bushwalk
7	3	Coral viewing
9	1	Forest experience

Sightseeing is the most popular activity among the Japanese tourists, followed by dolphin viewing (including swimming) and wildflower viewing. However, activities vary with tourists' taste.

Q7 What information on national parks, reserves, areas and activities do you provide for the tours?

Information	Percentage	Language
Verbal information on request	71%	in Japanese
Guided tours	86%	in Japanese
Brochures (WATC)	14%	when available
Own brochures	71%	Japanese brochure
Other written information	57%	Japanese tour guide book
CALM's publications	14%	
Other	0%	

Tour operators' service is mostly in Japanese, e.g., verbal information, guided tours and brochures. That is a requirement from tourists. However, these days, FIT (free independent travellers) are increasing, who would avoid such extra costs from their budgets. Still some 90% of tourists use travel agency.

Q8 Do you think CALM's publications fulfil Japanese tourists' requirements?

0	7
0%	100%

None of those interviewed stated that CALM's publications fulfil Japanese tourists' requirements. They mentioned a language barrier/problem, and there is not enough information in Japanese.

I believe that introduction leaflet (pre-visit information) in Japanese, which cover major national parks with maps and some commentary would be efficient. The real problem is no such leaflet is available even in English.

Honestly speaking, when I joined CALM and started to learn about the CALM's locations, I had difficulties. As I could not find any maps with sketchy outlined information for national parks/reserves. Thus, I do feel a need for such introduction leaflet.

11/2
No, that
right!

Q9 Is there a need for CALM's publication in Japanese?

7	0
100%	0%

Every single personnel wants to have CALM's publication translated into Japanese.

Q10 Are you aware of CALM's Home Page on the Internet?

2	5
29%	71%

Majority of tour operators did not know CALM's Home Page on the Internet. However, they did not show an interest in Internet.

Q11 What types of educational programs/materials should be provided by CALM to fulfil your needs as a Japanese Tour Operator?

a) Training Courses:

0	2	4	1
0%	29%	57%	14%

Duration of courses:

1	2	1	3
14%	29%	14%	43%

Nearly 90% of tour operators were interested in training courses. They would like to have it for tour guides training course. Education for tour guide should be very important.

b) Materials

Videos		Publications	
0	3	0	5
0%	38%	0%	63%

Publications were prioritized on, followed by videos. Japanese people still believe that reading booklets/leaflets is the best way to learn, although other media is very popular. However, some thinks that video is more effective, as of visual materials. Unfortunately, none of those interviewed showed a interest in CD ROM or Internet.

There is a need for a information that everyone can easily access, as CD ROM and/or Internet are still considered as special tools.

Q12 Would you be prepared to purchase these materials/courses, if they were made available?

4	1	2
57%	14%	29%

Approximately 60% are willing to make payments for these materials and/or courses, if the information is to be useful, updated and detailed. Some were concerned about its quality.

Q13 Have you been receiving CALM's newsletter and updates?

2	5
29%	71%

Over 70% did not receive CALM's newsletter and updates. We may send it right away.

Q14 Further comments:

There were some criticisms regarding CALM activities. Comments follow.

- Generally CALM do an excellent job, only complaint is that they are usually slow in replying to request for information and other administration areas.
- Prior to spending money on publications, CALM should first ensure that the product, including safety in the parks, is suitable for the international market

ALIST
OF
JAPANESE INBOUND TOUR OPERATORS

Japan Pacific Holidays Pty Ltd.

Suite 71, City West Business Centre,
Cnr Railway Pde & Havelock Mall,
West Perth, WA 6005
Telephone: 9481 3800
Facsimilli: 9481 7891

Contact: Inbound Manager
Tatsuhiko Huase

JCT Australia Pty Ltd.

6th Floor, 5 Mill Street
Perth, WA 6000
Telephone: 9481 3488
Facsimilli: 9481 7427

Contact: Inbound Manager WA
Brad Crump

Japan Travel Bureau Australia Pty Ltd

Perth Office
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77 St. George's Terrace,
Perth, WA 6000
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Facsimilli: 9221 5828

Contact: Manager
Loretta De Stefani

Kintetsu International Express (Oceania) PTY LTD

Level 10/16 St. George's Terrace,
Perth, WA 6000
Telephone: 9221 4029
Facsimilli: 9421 1860

Contact: Manager
Junko Matsuzaki

Nippon Travel Agency*

Perth Office
Level 23, St Martin's Tower
44 St. George's Terrace
Perth, WA 6000
Telephone: 9268 2488
Facsimilli: 9268 2444

*This Perth Office will be closed on May 31, 1997.

Contact: Office Manager
Isako Lund

Shoji Australia

1st Floor, 175 Hay Street,
East Perth, WA 6004
Telephone: 9221 5005
Facsimilli: 9221 3082

Contact: General Manager
Takako Shoji

Trans Orbit Pty. Ltd.

7th floor, 16 St. George's Terrace
Perth, WA 6000
Telephone: 9421 1070
Facsimilli: 9421 1071

Contact: Branch Manager-Perth
Isao "Sam" Kyuma

Thomas Cook Ltd. Inbound

Shop 22/23 Wesley Centre,
760 Hay Street,
Perth, WA 6000
Telephone: 9321 6002
Facsimile: 9321 3491

Contact: Area Manager
Kazuko Nagatani

DY Travel Pty. Ltd.

22 Kebroyd Way
Kallaroo, WA 6025
Telephone: 9401 2273
Facsimilli: 6401 2273

Contact:
Duncan Mitchell, Yumiko Hayashi

Japanese Tour Operators Survey

The Department of Conservation and Land Management (CALM) is conducting a survey to find out what Japanese Tour Operators think of the information available to Japanese tourists on natural areas that it controls.

Your opinions will assist us to improve the understanding of the natural environment by the Japanese tourists visiting West Australian national parks and reserves and ultimately enrich their tourist experience.

Please complete this questionnaire and return it to the Department of Conservation and Land Management using the enclosed reply paid envelope.

If you have any questions about this survey please contact Ms. Keiko Sasaki on (09) 334 0362. Thank you for your assistance.

Q1. Do you conduct nature based tours for Japanese tourists into national parks and reserves ?

(Please tick one)

Yes ☐ 1

No ☐ 2 No more questions. End of survey.

Q2. How many Japanese tours into national parks and reserves do you usually conduct ?

(Please write a number in one of the boxes)

Tours/day ☐ 1

Tours/week ☐ 2

Tours/month ☐ 3

Tours/year ☐ 4

Q3. What is the average size of a tour into national parks and reserves ?

(Please write a number in the box)

Average of People/tour

Q4. Are the tours into national parks and reserves part of :

(Please tick appropriate box/es)

Package tours ☐ 1

Optional tours ☐ 2

Special interest tours ☐ 3

Other (please specify below :) ☐ 4

Q5. Which of the following national parks, reserves and other areas do you conduct tours into ?

(Please tick how satisfying the visits to these areas have been in respect to meeting your clients expectations :)

<i>(Please tick appropriate box/es)</i>	Reason(s) for visiting each area :	How often ?	Very satisfying	Satisfying	Moderately satisfying	Not at all satisfying	Comments :
Yanchep National Park <input type="checkbox"/> 1	_____	_____/month	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Penguin Island <input type="checkbox"/> 2	_____	_____/month	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Nambung National Park(Pinnacles) <input type="checkbox"/> 3	_____	_____/month	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Ningaloo Marine Park <input type="checkbox"/> 4	_____	_____/month	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Monkey Mia <input type="checkbox"/> 5	_____	_____/month	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Walpole-Nornalup(Tree Top Walk) <input type="checkbox"/> 6	_____	_____/month	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
Other (Please specify below :) <input type="checkbox"/> 7	_____	_____/month	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	_____
<div style="border: 1px solid black; height: 20px; width: 250px; margin-top: 10px;"></div>							

Q6. Please refer to Attachment A which lists national parks, reserves, areas and activities and indicate the five most important ones to your tours.

National Parks/Reserves/Areas :

1. _____
2. _____
3. _____
4. _____
5. _____

Reasons for visiting these areas :

- _____
- _____
- _____
- _____
- _____

Activities :

1. _____
2. _____
3. _____
4. _____
5. _____

Reasons for carrying out these activities :

- _____
- _____
- _____
- _____
- _____

Q7. What information on national parks, reserves, areas and activities do you provide for the tours ?

(Please tick appropriate box/es)

Comments :

Verbal information on request ☐ 1

Guided tours ☐ 2

Brochures (WATC) ☐ 3

Own brochures ☐ 4

Other written information ☐ 5

CALM's publications ☐ 6

Other (Please specify below :) ☐ 7

Q8. Do you think CALM's publications fulfil Japanese tourists' requirements ?

(Please tick one)

Please explain why :

Yes ☐ 1

No ☐ 2

Q9. Is there a need for CALM's publications in Japanese?

(Please tick one)

Comments :

Yes ☐ 1

No ☐ 2

Q10. Are you aware of CALM's Home Page on the Internet ?

(Please tick one)

Comments :

Yes ☐ 1

No ☐ 2

Q11. What types of educational programs/materials should be provided by CALM to fulfil your needs as a Japanese Tour Operator ?

a) Training Courses

Duration of courses :

(Please tick appropriate box/es)

(Please tick one)

Conferences ☐ 1

Half day ☐ 4

Seminars ☐ 2

Full day ☐ 5

Courses ☐ 3

Other (Please specify below :) ☐ 6

b) Materials

(Please tick appropriate box/es)

Comments :

CD ROM ☐ 1

Videos ☐ 2

Internet ☐ 3

Publications ☐ 4

Q12. **Would you be prepared to purchase these materials/courses if they were made available ?**

(Please tick one)

Yes ☐ 1

No ☐ 2

Comments :

Q13. **Have you been receiving CALM's newsletter and updates ?**

(Please tick one)

Yes ☐ 1

No ☐ 2

If you would like to receive these please write your contact address on Attachment B.

Q14. **Further comments :**

Thank you very much for your assistance.

A list of major national parks/reserves

Greater Perth area

- Yanchep National Park
- The Hills Forest
- The Forest Heritage Centre
- Shoalwater Islands (Penguin Island)
- Walyunga National Park
- John Forrest National Park
- Serpentine National Park
- Marmion Marine Park

Great Northern

- Nambung National Park (Pinnacles)
- Kalbarri National Park
- Ningaloo Marine Park (including Coral Bay)
- Cape Range National Park
- Shark Bay (Monkey Mia, François Peron National Park)
- Karijini National Park
- Millstream-Chichester National Park
- Geikie Gorge National Park
- Purnululu National Park (Bungle Bungle)

Great Southern

- Leeuwin-Naturaliste National Park
- Karri Forest
- Walpole-Nornalup National Park (Tree Top Walk)
- Stirling Range National Park
- William Bay National Park
- Blackwood Valley
- Brockman
- Gloucester Tree National Park
- Fitzgerald River National Park
- Cape Le Grand National Park
- Torndirrup National Park
- Shannon D'Entrecasteaux National Park

A list of major activities

- Sightseeing
- Whale watching
- Whaleshark viewing (and/or swimming with whalesharks)
- Dolphin and/or Dugong viewing
- Coral viewing
- Diving and snorkelling
- Bird watching
- Bush walking
- Camping
- Wildlife viewing
- Wildflower viewing
- Photography

ATTACHMENT B

Yes, I would like to receive CALM's Newsletters and updates

Company Name _____

Contact Person _____

Address _____

Telephone contact number _____

Fax number _____

Department of Conservation & Land Management (CALM)

Japanese Tourism Survey

There were approximately 50 effective survey samples for Nambung National Park, over 600 copies of questionnaire sheet were delivered through Japanese Inbound Tour Operators.

According to this survey, nearly 80% of participants visited Australia as their first time. And some 90% of participants mentioned that it was their first visit to Pinnacles.

Most people had particular interests in Pinnacles to choose this location, and most of them had an information about Pinnacles through magazine articles.

100% of participants appreciated and were very satisfied or satisfied with natural attractiveness of the area/location itself, although there were a few complaint, i.e., toilets and information.

Unfortunately, lots of participants answered that "the information about this location was NOT readily available". They commented that as only English information was provided. However, they could enjoy and manage to understand information through picture and/or photos. But, most of them would like to have brochures and information shelters translated into Japanese language.

Over 80% of participants would like to come back to Pinnacles again.

The result of survey follows.

Q1. Was this your first visit to Australia?

39	12
76%	24%

Approximately 80% of participants mentioned that this was their first visit to Australia. There were several repeaters, who had visited Australia for three times.

Q2 Was this your first visit to this location?

Yes	No
48	3
94%	6%

Although there were some repeaters, over 90% of participants were the first visitors to Pinnacles. Probably because, this survey questionnaires were delivered to the group tour participants.

Q3 Why did you choose this location?

From the Magazine	From the Tourist Commission	From a friend	Other
0	3	42	6
0%	6%	82%	12%

Surprisingly, most of people mentioned that they had special interests for Pinnacles, which I had not expected at all. According to the Japanese inbound tour operators, Pinnacles was rated as No. 1 favourable destination.

I had opportunities to talk with several participants directly. All tourists who I interviewed were greatly impressed with such unusual and spectacular views. They also enjoyed driving on sands very much.

Q4 How did you find out about this location?

Magazine	From the Tourist Commission	Recommended by friends	Other
33	0	6	12
65%	0%	12%	24%

Most of people were reading magazine articles about Pinnacles. For your information, a copy of such articles on the latest guide book for Western Australia (in corporation with WATC, Western Australia Tourism Commission) attached. Usually, Japanese tourists are well prepared for tour destination, prior to visiting. They like gathering information.

And some were recommended by friends or relatives.

Q5 Name of location?

The Nambung National Park (Pinnacles)

Q6 Please tick how satisfied you were with the following facilities and services that you used during your visit:

	Very satisfied	Satisfied	Moderately satisfied	Not at all satisfied	No comment
Toilets	24%	24%	35%	18%	0%
BBQs	0%	18%	6%	0%	76%
Picnic area/tables	0%	6%	29%	0%	65%
Cleanliness of the area	24%	29%	24%	6%	18%
Condition of roads	24%	29%	29%	0%	18%
Activities	29%	47%	6%	0%	18%
Information	0%	29%	29%	12%	29%
Visitor Center	0%	0%	0%	0%	100%
Friendly staff	53%	18%	0%	0%	29%
Informative staff	41%	29%	6%	0%	24%%
Natural attractiveness	82%	18%	0%	0%	0%
Quality of tour	59%	12%	24%	0%	6%
Overall satisfaction	47%	35%	6%	0%	12%

As shown above, most of participants nearly satisfied (including very satisfied, satisfied and moderately satisfied) with *cleanliness of the area/location, condition of roads, activities, rangers/staff's friendliness and helpfulness, informative rangers/staffs, quality of commercial tour* and *overall satisfaction*.

Some participants were not satisfied at all for *toilets facilities* (number, standard, condition) and *information* (maps, signs, brochures).

All participants (100%) highly rated for satisfaction with *natural attractiveness of the area/location*, as very satisfied or satisfied.

Participants comments follow;

- It was a magnificent view, thus, it will be a wonderful memory for ever.
- Driving on sands was much fun.
- We should protect such spectacular natural beauty.

- Tour conductor was very good.
- It was an excellent weather, and tour was so smooth.

Q7 Was the information about this location readily available?

Yes	
6	45
12%	88%

Nearly 90% of participants mentioned that “the information about this location was NOT readily available”. I believe that this was attributed by language barriers. Participants would like to have Japanese introduction, although most of them enjoyed their visit anyway.

Usually, Japanese inbound tour operators use local tour operators for the tour to Nambung National Park, which means there is no interpretation for the participants. Therefore, many people may have difficulties to obtain enough and efficient information.

Q8 a. Did you have any difficulty understanding the language on signboards, brochures, etc?

Yes		
27	21	3
53%	41%	6%

They managed to understand the information through pictures/photos. However, some wanted to learn much detailed information, e.g., the name of wildflowers.

b. If yes, for which types of information would you like to have translated?

Information types			
33	0	15	0
69%	0%	31%	0%

People would like to have translated information for brochures and information shelters for their understanding.

Q9. Would you like to come back to this location again?

Yes	No
42	9
82%	18%

Over 80% of participants stated that they would like to come back to Pinnacles again.

Q10. Age group

	Under 15	15-24	25-39	40-59	60 & over
Females	0	9	9	3	3
	0%	18%	18%	6%	6%
Males	0	3	12	9	3
	0%	6%	24%	18%	6%

The most popular age group is "Males, 25-39", followed by "Female 15-24", "Females 25-39", and "Males 40-59".

8a. Did you have any difficulty understanding the language on signboards, brochures, etc?

☐

1. Yes

☐

2. No

Comments

b. If yes, for which types of information would you like to have translated?

(Please tick appropriate boxes)

☐

1. Brochures

☐

3. Information shelters

☐

2. Signs

☐

4. Other (please specify below)

--

Comments

9. Would you like to come back to this location again?

☐

1. Yes

☐

2. No

Comments

10. Age group (please write the number of people in your party in each age group, including yourself)

	Under 15	15-24	25-39	40-59	60 & over
Females					
Males					



Department of Conservation and Land Management

Japanese Tourism Survey

The Department of Conservation and Land Management (CALM) is conducting a survey to find out what Japanese tourists think of the facilities and services available to them on the natural areas that it controls.

Your opinions will assist us to improve the understanding of the natural environment by Japanese tourists visiting Western Australian national parks and reserves and ultimately enrich their tourist experience.

Please complete this questionnaire and return it to the Department of Conservation and Land Management using the enclosed reply paid envelope.

If you have any questions about this survey please contact Ms. Keiko Sasaki on (09) 334 0362. Thank you for your assistance.

Thank you for your help.

Conservation and Land Management *Caring Naturally*

SURVEY INSTRUCTIONS

Unless otherwise stated please only tick one answer to each question.

1. Was this your first visit to Australia?

- ☐ 1. Yes ☐ 2. No, I have visited _____ times before
(number)

2. Is this your first visit to this location?

- ☐ 1. Yes ☐ 2. No, I have visited _____ times before
(number)

3. Why did you choose this location?

(Please tick appropriate boxes)

- ☐ 1. It was part of a package tour ☐ 3. I had a special interest
☐ 2. It was part of an optional tour ☐ 4. Other (please specify below)

4. How did you find out about this location?

(Please tick appropriate boxes)

- ☐ 1. Magazine articles ☐ 3. Recommended by friends
☐ 2. From the Tourism Commission ☐ 4. Other (please specify below)

5. Name of location?



6. Please tick how satisfied you were with the following facilities and services that you have used during your visit:



(Please tick your response to each of these questions)

Very satisfied	Satisfied	Moderately satisfied	Not at all satisfied	Not applicable/not sure	
					a. Toilets (number, standard, condition)
					b. BBQs (number, standard, condition)
					c. Picnic areas and tables (number, standard, condition)
					d. Cleanliness of the area/location
					e. Condition of roads
					f. Activities
					g. Information (maps, signs, brochures)
					h. Visitor Centre
					i. Rangers/Staff were friendly and helpful
					j. Rangers/Staff were informative
					k. Natural attractiveness of the area/location
					l. Quality of commercial tour
					m. Overall satisfaction

Comments

7. Was the information about this location readily available?

- ☐ 1. Yes ☐ 2. No

Comments

Please turn over

SCHOOL EXCURSION

Please refer to the attachment, "Japanese Overseas School Excursions marketing Fact Sheet", which was prepared by ATC (Australian Tourist Commission). It contains enough information with background, potential market size and the Demands of Japanese clients and so forth.

1. Current market

The most popular overseas destinations, as school excursions in 1995 were Korea and China, followed by USA. Australia was ranked as No. 4, as shown below. Traditionally the top two destinations, Korea and China, have been popular due to the proximity and historical links with Japan. Other countries, i.e., USA, Australia and Hawaii enjoy their popularity, because of language preference (English-native countries).

Top Five Overseas Excursion Destinations in 1995.

Top Five Overseas Excursion Destinations in 1995				
Rank	Destination	No. of Schools	No. of Students	Duration (days)
1	Korea	209	42,326	4.6 days
2	China	109	29,644	5.3 days
3	USA	55	10,347	10.6 days
4	Australia	52	11,440	8.8 days
5	Hawaii	44	7,823	6 days

Source: Japan School Tours Bureau

There were 35 and 42 schools visited Australia as school excursions in 1993 and 1994, respectively, according to the statistics from Japan School Tours Bureau. In 1995, a total of 11,440 Japanese students from 52 junior and senior high schools visited Australia. It was growing with 120% increase each year

The most popular months for their stay are; September for senior High School students (ages 16 to 18), and July for junior School students (ages between 13 and 15).

2. Forecast

School excursion market is continuously growing, ATC expects that some 163 Japanese schools will be visiting in Australia in the year of 2001.

Forecast Increase for Year 2001

	1999	2000
Overseas school excursions	616 schools	1749 schools
Number of excursion participants	124,493 students	353,471 students
School excursions to Australia	52 schools	163 schools
Participants to Australia	11,440 students	35,860 students
Australian share (school basis)	8.4%	9.0%
Australian share (participant basis)	9.2%	10.0%
Average tour cost (per student)	Yen 252,043	Yen 250,000
Average shopping cost (per student)	Yen 50,000	Yen 50,000

Source: ATC Marketing Fact Sheet

As shown above, overseas school excursions are anticipated to be expanded. Therefore, both ATC and WATC have been focusing on its promotion.

3. Opportunities for CALM

School activities vary with each school. However, every school should focus on communication and exchange anyway. Some schools may prefer home stay programs, and/or culture exchange.

I believe all schools conduct at least one day excursion trip, it might be a tour to Pinnacles, if their destination was Western Australia. In addition to that, there are strong opportunities for CALM, e.g., conducting lectures and/or activity programs which may suit to school programme. Of course, this opportunities can be proposed with reasonable costs/fees and it should be marketed/promoted to junior and senior high schools. (Please refer to Hills Forest excursion programme.)

I could think of following programs may be suited for such school programs.

- Hills Forest bush activity programs
- Forest experience (camping or ecotel sites)
- Night spotlighting tour
- Perup wildness lodge
- Nature observation

I understand there is a limit of numbers for a night spotlighting tour and Perup wilderness lodge. They may be suitable for much smaller groups.

In recent years, Japanese people are, in general, getting very conscious about environment protection, nature conservation and/or recycling. As probably we have limited resources of land, water and materials.

I believe what CALM is doing must be very interesting for such people. For instance, Western Australia State Office had some inquiries regarding CALM's job (although they did not know the name of organisation), from NHK (which is like ABC in Australia, Government's owned broadcasting network) and so forth.

I, therefore, recommend prepare introductive programs and marketing/promoting such school programs to Japanese junior and senior high schools.

• EXCURSION PROGRAM

JUNIOR HIGH SCHOOL STUDENTS
OHNO CITY, JAPAN

Contact Person

Keiko Sasaki (Como, CALM) Monday & Wednesday
334 0362
cc : Jennifer Bryce

Japanese Inbound Tour Operator
Trans Orbit - Kyuma san
9421 1070

Excursion Details

Number of people	115 participants (including teachers and tour conductors)
Age of participants	students are 12 - 15 years (Junior High School)
Excursion dates	25th - 31st July 1997
Other activities	<ul style="list-style-type: none">- staying with Australian families- exchange cultures- nature study- visit to the Pinnacles (Nambung National Park) with a tour operator- possible visit to Yanchep NP on the way

Excursion Requirements / Needs

- * free afternoon on the 28th July 1997
- * interested to have lectures from CALM representatives
- * visit CALM locations
- * would like to divide into smaller groups eg. 50 pax x 2 groups or much smaller
- * activity oriented "lectures"
- * maybe use a school program that is already in place
- * Do they have special interests for CALM managed land & waters eg. forests, wildlife

Suitable Programs

aboriginal culture	guided walks and marsupials
wildflower walk	bbq, damper & camp evening
overnight horse trek	wood carving
nightshift - bush search	animal tracking eg. numbats, bats
bushcraft eg. edible plants, firelighting, string making	survey trapping
walk with llamas	

THE HILLS FOREST ACTIVITY CENTRE

PROGRAMME OUTLINE

FOR OHNO CITY JUNIOR HIGH SCHOOL STUDENTS

OPTION 1

ACTIVITY DESCRIPTION

12.00 - 1.00PM	Aussie BBQ Lunch (1) Sausages, salad, bread rolls, desert (2) Special Luch
12.30 - 1.00pm	Aboriginal Performance Whole Group Activity
1.00 - 1.50pm	Small Group Activity 1
1.55 - 2.45pm	Small Group Activity 2
2.45 - 3.00pm	Aussie Afternoon Tea Johnny Cakes, Billy Tea
3.00 - 3.50pm	Small Group Activity 3
3.55 - 4.45pm	Small group Activity 4
4.45 - 5.00pm	Closing Activity Tea/coffee Meet marsupials

OPTION 1 LUNCH

For 120	\$ 28.50
For 140	\$26.00

OPTION 2 With Special Lunch

With dessert

Cost / person	
for 120	\$ 30.00
for 140	\$ 28.00

Without Dessert

Cost / person	
for 120	\$ 26.00
for 140	\$ 24.00

THE HILLS FOREST ACTIVITY CENTRE

PROGRAMME OUTLINE

FOR OHNO CITY JUNIOR HIGH SCHOOL STUDENTS

OPTION 2

ACTIVITY DESCRIPTION

12.45 - 1.00pm	Introduction to The Forest
1.00 - 1.50pm	Small Group Activity 1
1.55 - 2.45pm	Small Group Activity 2
2.45 - 3.00pm	Aussie Afternoon Tea Johnny Cakes, Billy Tea
3.00 - 3.50pm	Small Group Activity 3
3.55 - 4.45pm	Small group Activity 4
4.45 - 5.00pm	Closing Activity Tea/coffee Meet marsupials

For 120 People \$ 22 / head

For 140 People \$ 20 / head

SMALL GROUP ACTIVITY OUTLINE (Groups of 30 + interpreters)

Activity 1 - 50 mins

' A Day in the Forest '

- * 5 min bus trip
- * softwood / hardwoods
- * timber production
- * natural oils
- * walk to Helena Reservoir

Wet Weather Alternative - spend more time in the bus and a shorter walking time

Activity 2 - 50 mins

The Aboriginal Way - the Original Way

- * natural food and medicines
- * shelter eg. mia mia
- * tools
- * musical implements
- * stories and legends

Wet Weather Alternative - undercover at camping site or outdoor cinema

Activity 3 - 50 mins

' Forest Paper Making '

- * using natural materials from the bush
- * make cards with flowers
- * something to take away with you as a memory from 'The Forest '

Wet Weather Alternative - Under cover of the verandah of the Resource Centre

Activity 4 - 50 mins

' Bush Mysteries '

- * walk into the bush
- * story of animals in the bush ie. how do they 'fit in' to the forest
- * big animals / small animals
- * signs of animals in the bush eg. scratchings, chew marks, scats etc.
- * meet the marsupials. A chance to see close up some of the animals in the forest.

Wet Weather Alternative - undercover in the Resource Centre



Japanese Overseas School Excursions Marketing Fact Sheet

September, 1996

In recent years the Australian Tourist Commission (ATC) has been keenly aware of the growing potential of the overseas school excursion market. The main features of this market have been summarised below. The aim of this marketing fact sheet is to encourage a deeper understanding of Japanese school excursions by Australian product suppliers.

1. Historical Background of School Excursion (*Shugaku Ryoko*)

The history of the Japanese school excursions dates back to the 1880's. They were originally called "walking trips" and were considered a part of physical education involving group activity. Years later, school excursions included not only physical exercise, but also visits to temples and/or participation in volunteer programs. When schools started using public transportation, the trips became more like tours designed to enjoy the places being visited.

From around 1976, the objectives of school excursions began to diversify in response to social and cultural changes, and started to include trips to Hiroshima and Nagasaki, the target of the World War II atomic bombings, as well as ski trips. Overseas excursions also commenced around this period. However, it was not until 1990 that strong growth in the overseas school excursions market began to emerge. In 1990 a total of 181 overseas school excursions took place. Popularity of the excursions started to show strong signs of growth in the following years reaching 616 in 1995.



Many Japanese parents actively support overseas trips. They believe that in the age of globalization their children should acquire a sense of *kokusai sensu*, or a sense of internationalism, through foreign travel when they are young.

2. Features of School Excursions in Japan

Table 1. The Japanese Education System.

School level	Age	Grades
Primary School	7 - 12	6
Junior High School	13 - 15	3
Senior High School	16 - 18	3
Technical Collage	16 - 20	5
Junior Collage	19 - 20	2
University	19 - 22	4
Postgraduate	23 - 26	2 + 2

Table 1 presents a breakdown of the Japanese education system, the age of students and number of grades at each level. School excursions are normally conducted periodically, once in the sixth year of primary school, in the third year of junior high school, and in the second year of senior high school.

School excursions can only be conducted if all, or almost all, students participate due to school regulations. These trips are different from study tours or summer school as participation is often compulsory. In addition, the duration of excursions is usually kept within a week, considerably shorter than that of study tours and summer school.

The main objectives of school excursions are:

- To study history, geography, and culture
- To teach students social discipline
- To provide students with an understanding of the environment
- To deepen the understanding amongst students, and between students and teachers
- To create a positive set of school memories

While most primary schools choose domestic destinations for their school excursions, 616 junior and senior high schools chose overseas destinations in 1995. Destinations are selected by either the School Principal, faculty meetings or meetings of grade teachers. The opinions of parents are also taken into consideration. The method of decision depends entirely on the school.

3. Potential Market Size and Number of Students & Schools in Japan

Table 2. Number and Type of Schools and Students in Japan in May 1995.

	Number of Public Schools	Number of Private Schools	Total Number of Schools	Enrolled Public School Students	Enrolled Private School Students	Total number of Students Enrolled
Primary School	24,376	173	24,549	8,302,060	68,187	8,370,247
Junior High School	10,629	645	11,274	4,335,008	235,384	4,570,392
Senior High School	4,181	1,320	5,501	3,298,407	1,426,540	4,724,947
Technical Collage	59	3	62	n/a	n/a	54,739
Junior Collage	96	500	596	37,869	460,649	498,518
University	150	415	565	n/a	n/a	2,546,646

(Source: Japan Ministry of Education)

Table 2 shows the number of students enrolled in all levels of education in Japan. In 1995, 3,102,200 students (1,545,900 junior high school students and 1,556,300 senior high school students) were in grades that go on school excursions. Due to the decrease in the birth rate, this number is anticipated to fall to 2,780,000 by the year 2001.

Public schools must follow the regulations set by the prefectural board of education when organising a tour. The prefectural boards are similar to the Departments of Education found in Australian States and Territories. However, in Japan only public schools have to follow the regulations and guidelines set out by their governing prefectural board.

The following items are prescribed in the regulations:

- Length of tour
- Cost of tour
- Destination
- Timing of tour

Thirty-two out of 47 prefectural boards of education and four city boards of education approve of overseas excursions. This accounts for 60% of all prefectural and city boards of education in Japan. The accepted length of tours for public schools ranges from four to seven days.

There are, however, a number of guidelines that make some public schools reluctant to organise overseas excursions. Examples are:

- The minimum length of tour is four days
- The cost of tour cannot exceed ¥55,000 (A\$733)
- Permission is granted for domestic travel only
- Travelling by air is prohibited or approval is needed from the relevant board of education
- Travelling at night is prohibited

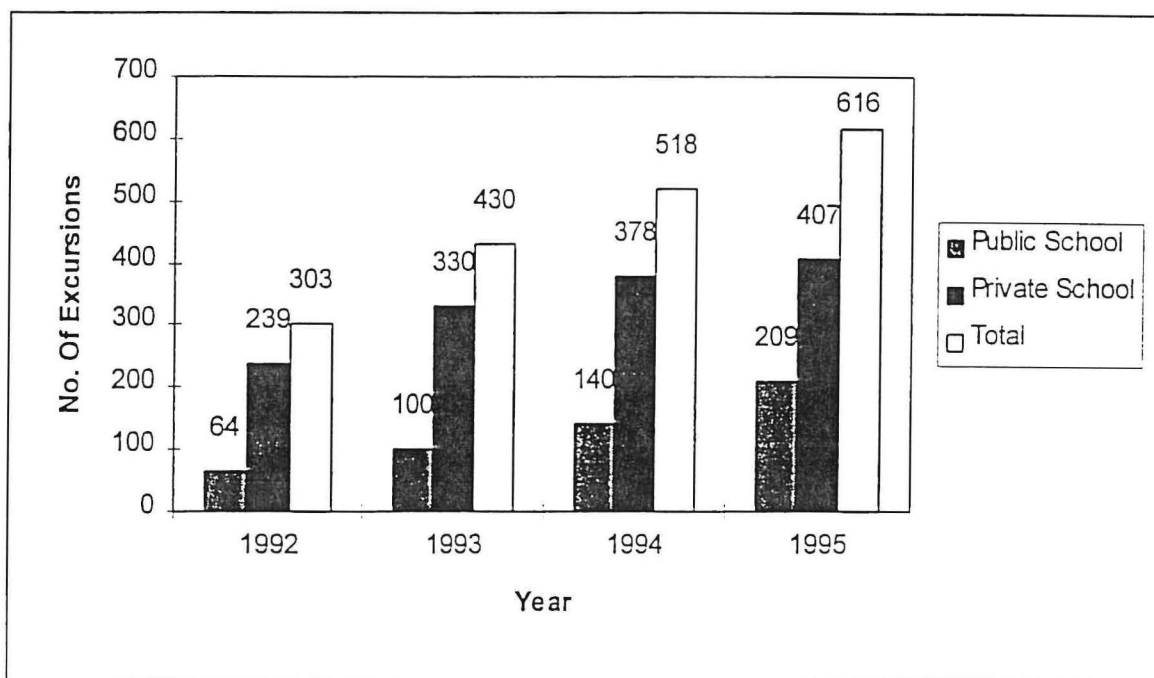
Table 3. The Number of Public and Private High Schools that Conducted Overseas School Excursions and the Number of Enrolled Students 1992 to 1995.

Year	Public High Schools	Private High Schools	Total Number of Schools	Number of Students
1992	64	239	303	73,550
1993	100	330	430	91,420
1994	140	378	518	106,763
1995	209	407	616	124,493

(Source: Japan School Tours Bureau)

As private schools are not limited by the same regulations as public schools they are able to organise a greater number of overseas excursions. As the school aged proportion of the population in Japan decreases, the competition for enrolments is becoming greater between schools. Many schools use the inclusion of overseas excursions in their curriculums as a means of attracting more students. This environment and the greater number of private schools as shown in Table 3, is the reason why private schools have historically conducted a significantly greater number of overseas school excursions in recent years as highlighted by Chart 1.

Chart 1. Number of Public and Private High Schools that Conducted Overseas Excursions 1992 to 1995.



(Source: Japan School Tours Bureau.)

4. Overseas School Excursions

Table 4. Top Five Overseas Excursion Destinations in 1995.

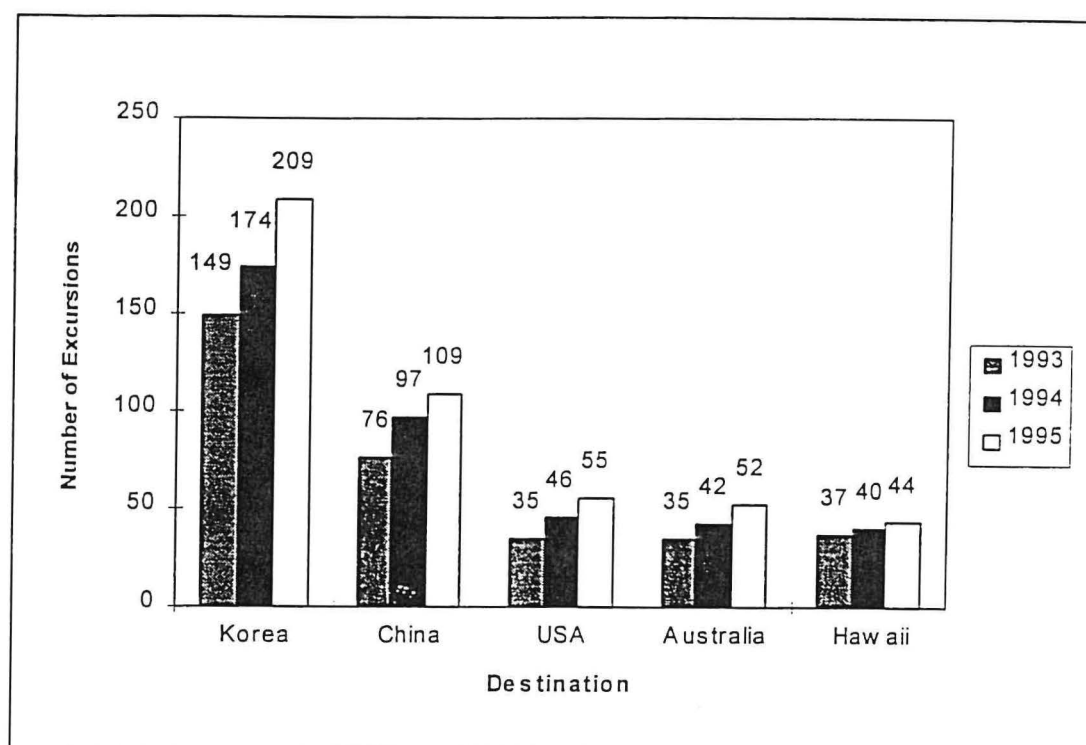
	Destination	Number of Schools	Number of Students	Average Length of Tour
1	Korea	209	42,326	4.6 days
2	China	109	29,644	5.3 days
3	USA	55	10,347	10.6 days
4	Australia	52	11,440	8.8 days
5	Hawaii	44	7,823	6 days

(Source: Japan School Tours Bureau)

Table 4 shows that the most popular overseas destinations in 1995 were Korea and China. Traditionally these two destinations have been popular due to their proximity and historical links with Japan, although in recent years the popularity of Western destinations has been increasing.

The US was also a popular destination in 1995. Due to safety problems, however, many schools have tended to shift from the United States to destinations perceived as being safer such as Australia, New Zealand, Canada and England. Chart 2 shows the number of school excursions that the top five overseas destinations have received for the period 1993 to 1995.

Chart 2. Total Number of Overseas School Excursions to the Top Five International Destinations 1993 to 1995



(Source: Japan School Tours Bureau)

Although Kyushu ranks fourth in Japan in terms of the total outbound tourism market, it tops the overseas school excursion market. Geographically, Kyushu's close proximity to Korea and China accounts for the reason why 63% of the schools choose these locations for overseas destinations. Destinations chosen by schools within a particular region in Japan are presented in Table 5.

Table 5. Number of Junior and Senior High Schools Which Conducted Overseas School Excursions by Region in 1995.

Region	Korea	China	USA	Australia	Hawaii	Other	Total
Hokkaido	5	0	2	1	0	2	10
Tohoku	17	2	7	2	9	9	46
Kanto	12	19	15	19	10	45	120
Chubu	41	11	8	6	5	25	96
Kinki	22	8	13	8	4	22	77
Chugoku	49	4	3	1	5	11	73
Shikoku	18	1	0	0	2	1	22
Kyushu	45	64	7	15	9	32	172
Total	209	109	55	52	44	147	616

(Source: Japan School Tours Bureau)

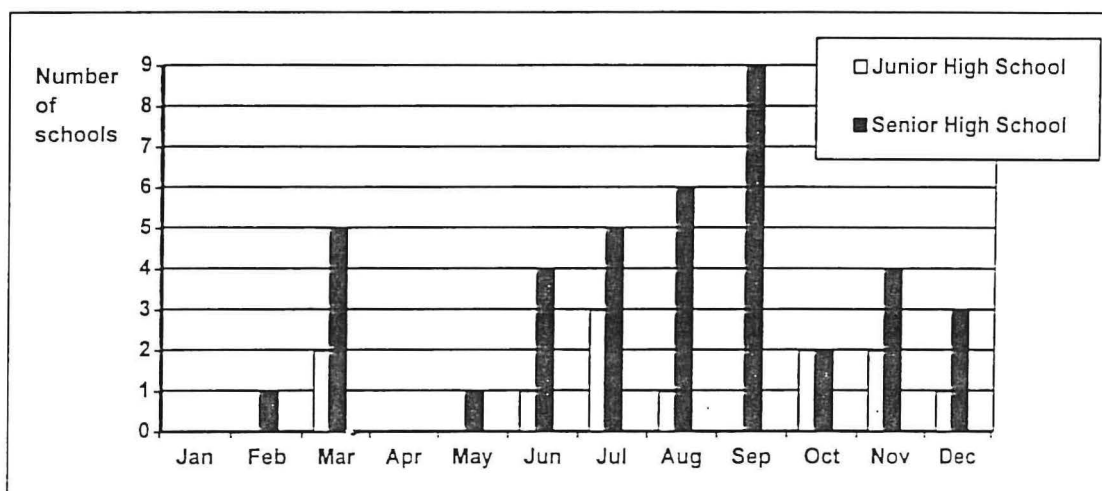
5. School Excursions to Australia

In 1995, a total of 11,440 Japanese students from 52 junior and senior high schools visited Australia.

Comparing 1993 to 1995, the number of schools conducting school excursions to Australia have increased by 150%, and the number of participating students by 165%.

Chart 3 presents a breakdown of the time of year that junior and senior high school excursions visited Australia. In January Australian schools are closed and airfares are higher, which accounts for the lack of excursions in this month. The lack of excursions in April is because this is the month in which the Japanese school year begins.

Chart 3. Number of School Excursions to Australia by Month for 1995.



(Source: Japan School Tours Bureau)

6. Positive Features of Australia as an Overseas School Excursion Destination

Australia has a number of positive attributes that make it an attractive destination for the Japanese overseas school excursions. These are:

1. Safety
2. Minimal time difference
3. Short flight time
4. Unique flora and fauna
5. English is the native language
6. The people are perceived as being friendly
7. Japanese people feel welcome in Australia

7. Role of the Travel Trade

Travel agents are relied upon heavily for the planning of overseas school excursions. Due to the nature of overseas school excursions and their special requirements, especially in terms of safety, often only major agencies are fully able to service this market. These agencies often have specialised departments to handle this market.

Another feature of school excursions is the lead time for planning before travel. The volume of passengers and special arrangements make the planning time considerably greater than that for other forms of group travel.

8. Issues for Australian Suppliers & the Demands of Japanese Clients

- The cost of the tour must be affordable for the parents.
- Standard package tours utilising four or five star accommodation are not always suitable for overseas school excursion tours.
- More information must be gathered and provided for more suitable transportation and accommodation (e.g. conference centres or campsites) which can handle groups of 100 to 600 students.
- When considering the age group of the students (16 to 18 years old), there is a demand for home stay or farm stay programs.
- The demand for school visitation programs will further increase in the future. The questions facing travel agents and teachers are:
 - Who to approach ?
 - Which schools to choose ?
 - How to organise communication and exchange within the program?
- On the Australian side, suppliers need to consider how student discounts (e.g. entrance fees) apply to overseas students.
- A few Australian Education Departments have begun charging "recovery costs" for visits to Australian schools. This is a system that exists in no other country. Although the logic behind it may be reasonable, amounts over \$100 per student are considered too high by the schools and/or organising travel agents.

9. ATC's Activities

The following is a brief outline of the activities that the ATC has been undertaking in promoting Australia as a destination for Japanese school excursions.

1993/1994

- Placed a full page advertisement in the Mainichi Newspaper.
- Held six seminars throughout Japan. 140 school teachers and 237 travel agents attended the seminars, and 70% of the teachers considered the seminars to be effective.
- Produced and distributed a *School Excursion Model Course Manual* at the above seminars and other seminars conducted by travel agents.

1994/1995

- Active support was given to travel agencies who conducted in-house seminars and school excursion seminars for school teachers.

1995/1996

- Actively supported travel agencies who conducted school excursion and educational seminars for school teachers. In some instances ATC staff were on hand to provide presentations to these groups as required.
- Placed an advertisement in a pamphlet that was published by a major travel agency.
- Published 10,000 copies of the *Guide for School Excursion to Australia* and distributed it to 250 travel agencies that handle school excursions.
- In conjunction with the Australia-Japan Foundation, distributed *Discover Australia* videos and text books to 11,200 public and private junior high schools in Japan.

1996/1997

- The ATC continues to provide active support to the travel agencies.
- Distributing the *Guide for School Excursion to Australia* to 2,500 schools and at seminars conducted by recognised travel agencies.
- Reprint *Guide for School Excursions to Australia*.
- Produce *School Excursion to Australia* video.

- Place advertisements in travel agent pamphlets, trade magazines and the *School Excursion* magazine published by the Japan School Tours Bureau.
- In conjunction with the Australian Embassy, the ATC distributes a kit containing the *Guide for School Excursion to Australia* and three press releases of educational materials from the Australian Embassy, to 87 media such as trade publishers, other educational groups and newspapers in Japan.

10. Activities of Other Australian Organisations Supporting the Educational Market

Australian Embassy

- Supports seminars and fairs
- Plans and executes media tours
- Provides information on the benefits of taking school excursion tours to Australia in conjunction with ATC
- Holds English-Language-Speaking Competitions
- Operates the Australia-Japan Alumni Association
- Further develops relationships with major travel agent representatives
- Runs Netscape's Communication Server

Australian International Education Foundation

- Operates an Australia-Japan Fellowship
- Provides information for educational programs, including home stay programs
- Supports travel agents
- Conducts market surveys
- Dispatches missions to Australia
- General publicity

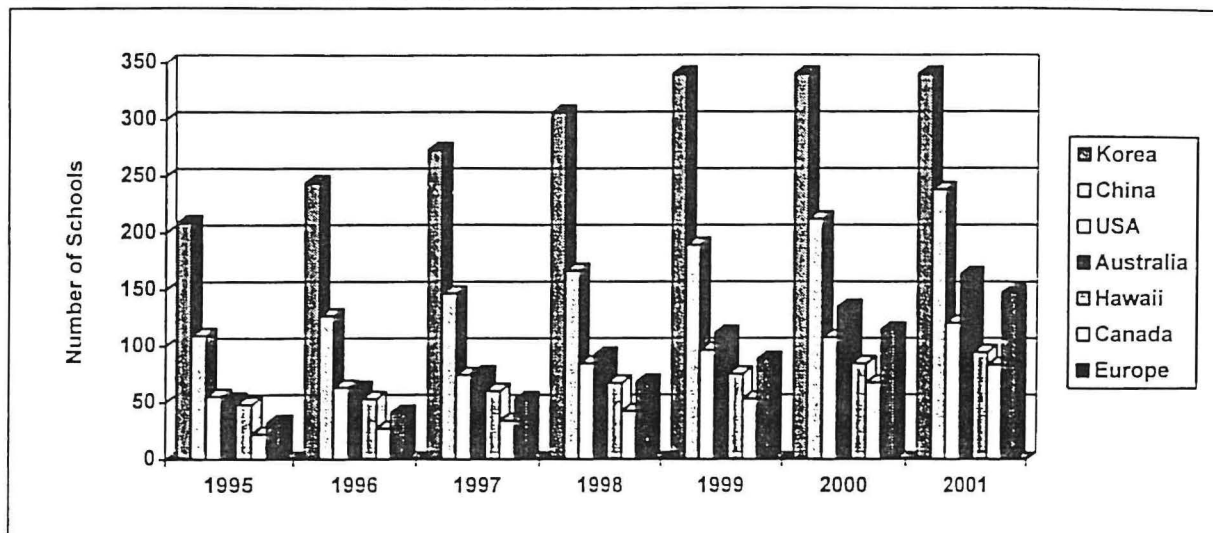
**For further information, contact Misao Yamauchi, Australian Tourist Commission, Osaka, Japan. Phone:(81 6)946-2503
Fax:(81 6)946-2473**

Disclaimer: Every effort has been made to ensure the accuracy of the information provided in this document at the time of publication. The Australian Tourist Commission does not accept any responsibility or liability for any damages resulting, directly or indirectly, from the use of the information and analysis contained in this document.



11. Forecast for Overseas School Excursions

Chart 4. Forecast Number of School Excursions to Seven Destinations to 2001



- It is assumed that increasing ratio of School Excursion to overseas is 19% per annum.
- Australia will keep the position that is one of the most popular destination for school excursion.
- The number of School Excursion to Australia is expected to increase 21% per annum.

Table 6. Forecast Increase for Year 2001

	1995	2001
Overseas school excursions	616 schools	1,749 schools
Number of excursion participants	124,493 students	353,471 students
School excursions to Australia	52 schools	163 schools
Participants to Australia	11,440 students	35,860 students
Australian share (school basis)	8.4%	9.0%
Australian share (participant basis)	9.2%	10.0%
Average tour cost (per student)	¥252,043	¥250,000
Average shopping cost (per student)	¥50,000	¥50,000

PROPOSED SPECIAL PROGRAMS FOR CALM

I would recommend preparing and marketing/promoting following specialised tour programs mainly targeted for silver aged people (50 years and over) for the Japanese travel agencies and/or other related companies (e.g., Senshukai).

In the recent years, there are lots of retired people who want to do something for the society. Some do voluntary work. But, most of them often are in dilemma as they do not know what to do. Especially, those generations (mainly male) have lived to their business life. They eagerly want to do contribute to the society.

Some those people had gone to China and/or Africa, and their main purpose was to plant trees on deserts. Such tours exists in Japan.

In addition, travel agencies anticipate less people use travel agencies for an ordinary tour in the future, although some 90% of tourists still use tour agencies at the time being. So, they have to invent special programs to attract public attention.

1. Participating in tree planting program

Target: Silver aged people (50 years old and over) and housewives
Terms: 1 or 2 days

Selecting nursery, plantation site and education are responsible by CALM. Prior to planting trees, suitable education including lecture should be conducted. If certificates are given to the participants, this will be more attractive.

2. Participating in volunteer training program

Target: silver aged people
Terms: 2 to 3 days

Volunteer training seminars, followed by voluntary works (beginners level) are conducted by CALM representatives. Certificates as volunteer and volunteer caps may be offered by CALM.

STATUS REPORT

Date: September 14, 1996

Name of Place visited: Valley of the Giants,
Walpole-Nornalup National Park

"TREE TOP WALK OPENING"

Person(s) in contact: Chris Haynes
Director of Regional Services

Travelling time: One (1) hour from Perth to Albany Airport on domestic flight

We were departing from Perth Airport at 7:30am and arrived at Albany at about 8:30am and took a bus to Valley of the Giants.

A ceremony was taken place at 11:00am, MLA, Premier of Western Australia, Mr. Richard Court celebrated the opening for Tree Top Walk, followed by the speech from Hon Minister for the Environment, Mr. Foss. Over 100 people attended the ceremony and enjoyed tree top walk. It was such a very exciting experience.

The return flight took approximately two hours from Albany Airport to Perth (departure from Albany at 3:00pm, arrival at Perth at 5:00pm). It was bumpy and the most terrified flight.

Syd will confirm this!!

Remarks:

Tree top walk was unique and wonderful experience, although I was slightly frightened, when it was very windy. I impressed deeply that we could start walking from the ground level and access to the tree top without climbing any stairs. It was such thoughtful arrangements for elder and handicapped people.

Atmosphere was very nice, surrounded by tall trees, and the signs were sophisticated.

If air plane is used (of course, smooth flight is preferred!), tree top walk can be a potential destination for Japanese tourists, as well as visiting Albany, Denmark, Manjimup, and Pemberton areas. It can be a day or two days trip.

I will try to visit this area again during Spring/Summer seasons to observe lands and facilities more carefully, as I think these areas are unique, interesting and prominent for one of favourite Japanese destinations.

Potentiality for Japanes/Asian tourism:

High level of expectation. (please refer to the report of "Valley of Giants").

Summary Report

Date: October 9 (Wed), 1996

Name of Place visited: **WA NATURALLY**

Person in contact: Estelle de San Miguel. Marketing and Sales Manager. Corporate Relations

Location: University of Notre Dame complex. 47 Henry Street. Fremantle

Travelling time: 25 minutes from Perth

Check list:

- | | | |
|----|-------------|-----------|
| 1. | Facilities | Very good |
| 2. | Information | Good |

Issue discussed:

1. Location This shop is situated at very nice location and wonderful atmosphere, however, it was hardly find the place by myself. Obviously, the bigger sign or bill board is necessary, although WA NATURALLY is housed within historic building in the University of Notre Dame complex.
2. Visitors According to Estelle, average number of people who were visiting WA NATURALLY is 50 people per day. The largest number of visitors was some 200 people. 80% of visitors were international travellers including Japanese/Asian tourists.
However, they have opened this center for just few months, this figure is just our reference.
3. Purpose At the present moment, most of people happened to walk in. However, people who have more specific interests for CALM's locations and/or activities are most welcome. Estelle and her staffs are anticipating such people will increase, as first article for WA NATURALLY was on spring 1996 edition of LANDSCOPE magazine. There are two main purposes for this shop; one is as Nature based tourist board, and the other is as an information center which is more visible, more accessible and providing better quality service.

Remarks/Recommendations:

It is very nice that CALM has visitor center in Fremantle. But, I assume it could be more commercialised, i.e., selling souvenir goods, e.g., T-shirts, hats and postcards etc, as I always appreciate sophisticated design of CALM's products. Especially, Japanese/Asian tourists are willing to buy souvenirs, but, tourists sometimes have difficulties to find fine Australian made products.

We should make leaflets (preferably, in Japanese) including major CALM's locations and activities to display them at WA NATURALLY as well as WATC (Western Australian Tourism Center) office in Tokyo, Japan.

Potentiality for Japanese/Asian tourism:

Medium to high level of expectation, if the information is properly provided to the public. If appropriate, more commercialised goods can be placed for sales.

Summary Report

Date: October 18 (Fri), 1996

Name of Place visited: Nambung National Park

Person in contact: David Rose. District Manager. Moora Region

Location: approx. 230 kilometres north from Perth

Travelling time: 3 hours drive from Perth

Check list:

1. **Facilities** Good. Even toilets were clean enough, compare to Japanese/Asian standard.

2. **Information/signs/brochures** Difficult to read (sometime, sign was too small to read.)

* Are there any translated materials in foreign languages? None

3. **Accommodation** Some at Cervantes

4. **Activities** Scenery of Pinnacles, photograph, swimming, picnic, meeting with animals and 4WD vehicle driving on coasts and sands.

Issue discussed:

Approx. 150,000 tourists per year, and some 80% was for Japanese/Asian tourists, which is approx. 105,000 people annually. Such a big proportion!

There are 70 different tour operators. And 50% of total tourists visit Pinnacles by such tours. And the rest of people hire cars. In this case, lots of people drive too first and ignore signs. Majority of Japanese/Asian tourists consider Rangers as policemen. They never ask questions to Rangers.

Although local CALM representatives encourage tour operators to buy lunch or stay overnight at Cervantes, most of tours are day trips and bring lunch and drinks from Perth.

Remarks/Recommendations:

I believe some translation has to be done, e.g., brief history and explanation of Nambung National Park, including driving instructions in the park. I would suggest making a survey of leading languages for the tourists who visit Nambung National Park. And make brief translation for leaflet/flyer with at least major languages, or audio tape may also be efficient at some locations.

As per Japanese/Asian tourists, they like to purchase souvenirs. If there is such a souvenir shop, as well as an information center, in National Park. I assume they would spend a lot.

It was magnificent and spectacular views at Pinnacles, especially for Japanese tourists, as such views do not exist in Japan. Further promotion recommended.

Potentiality for Japanese/Asian tourism:

High level of expectation. Pinnacles was ranked as No. 1, as day trip destination, according to the Japanese inbound tour operators.

Japanese people prefer unusual and spectacular views like as Pinnacles.

Summary Report

Date: October 23 (Wed), 1996

Name of Place visited: Penguin Island

Person in contact: Peter Dans, Marine Operations Manager, Swan Region and Kevin Crane

Location: Perth Water

Travelling time: A few minutes from Rockingham

Check list:

1. Facilities Very good (toilets were clean enough)

2. Information/signs/brochures More information needed.

* Are there any translated materials in foreign languages? None

3. Activities

Wildlife watching, swimming, snorkelling, surfing, photography and abalone catching (in season)

Issue discussed:

Some 84,000 tourists visited Penguin Island in 1995. There were very few Asian/Japanese tourists, although this location is convenient, fairly close to the city of Perth. I surmise this is attributed to less promotions.

There are approximately 600 pairs (1,200 in total) of little blue penguins in this island. Japanese people do not expect such little penguins, as we used to see rather big penguins at any Zoo in Japan.

Feeding the penguins can be seen at Discovery Centre at certain timings. But, penguin viewing is available seven days a week from 10:00 to 15:00 at Discovery Centre.

Remarks/Recommendations:

If people come by Ferry, they do not need to pay for admission fee. It should be informed more properly, as it was very confusing.

There was no brochure available on Penguin Island at Como Reception.

I was lucky enough to be able to see wild penguins in the morning. It is better to let the people know that there is less opportunity to see wild penguins, as people may be expected.

I was guided by Kevin, thus, I could get lots of information. But, generally, people do not have such opportunities. But, I think guided tour is interesting way to explore the unique Penguin Island.

Potentiality for Japanese/Asian tourism:

High level of expectation. Naming is so charming, and the location is very good (near Perth). In addition, many activities can be done, e.g., swimming and snorkelling. Only the problem is tourists' expectation of viewing penguins. People may expect to see a lot of wild penguins (like a penguin parade at Phillip Island, Victoria), however, the reality is viewing a few penguins in the visitor centre. Thus, proper information is necessary, prior to visit.

Summer period is recommended to visit Penguin island.

Summary Report

Date: October 28 (Mon), 1996

Name of Place visited: Fremantle Office

Person in contact: Noel Nannup and Trevor Walley, Aboriginal Tourism Unit

Location: University of Notre Dame complex, 47 Henry Street, Fremantle

Travelling time: 25 minutes from Perth

Issue discussed:

They have just started making programmes as Aboriginal activity, thus, some projects are under contemplation. At the time moment, they do focus on school educations.

They recommended me to visit Hills Forest and meet with Steve Slavin to explore the opportunity of Aboriginal culture. They also suggested visiting Wilyunga, Manjimup, Karrijini and Milstream areas.

Remarks/Recommendations:

I think it is interesting to have different cultural presentation for any tourists. Aboriginal culture and tradition should be very different from Australians. Some Japanese people like exotic culture, i.e., Thai and/or Indonesian cultures. They may like to experience extraordinary lifestyle and activities.

Potentiality for Japanese/Asian tourism:

Medium to high level of expectation. Information should be provided to the public.

Summary Report

Date: October 31 (Thu), 1996

Name of Place visited: Whale Watching

Person in contact: Doug Coughran. Supervising Wildlife Officer. Wildlife Protection Section. Wildlife Branch

Location: Perth Waters

Travelling time: 30 to 60 minutes from Fremantle

Issue discussed:

Australia's humpback whales can be seen in Perth waters from early spring to early summer. October is the best season, while mother whales and calves are seen well in November. There are 33 licensed commercial vessels in Perth metropolitan waters and usually less than 10 boats operate on an average per day in a season.

The interest in whale watching has expanded, now operating from the north, e.g., Exmouth, to south, e.g., Albany of WA.

Water was not calm on that day, besides, several whales were seen. They were very active in early morning, doing round out, fluke up dive, pec slap, tail slap, spy hop and even breach. However, they were getting rather quiet in the afternoon. Doug said it was fairly strange.

Remarks/Recommendations:

I believe that whale watching is a spectacular event. And it is convenient for the tourists, as it can be operated within Perth metropolitan area, and it takes only a few hours. Only a problem is probably sea sick for some people (I was lucky as I did not have any).

Honestly speaking, I did not have much interests before going. But, it was completely wrong idea. Now, I recommend anybody boarding on boat, enjoying sea breeze, and experience such wonderful opportunity. I greatly enjoyed such superb experience, as well as speedy run on the water.

I also impressed the cooperation of every boat, of course, including CALM's. They were communicating through the radio to search whales. It was well organised.

Potentiality for Japanese/Asian tourism:

High level of expectation. Only concern is sea sick. Otherwise, this activity is fun and easy to experience. This is a wonderful opportunity to meet with superb creature.

Summary Report

Date: November 29 (Fri), 1996

Name of Place visited: Monkey Mia

Person in contact: Paul Brown. District Manager. Gascoyne Region

Location: Approximately 600 kilometres north from Perth

Travelling time: 20 minutes from Denham

(It takes one and half hours on domestic flight from Perth to Shark Bay airport.)

Check list:

1. **Facilities** Good (Toilets were temporarily unavailable on 1, December)

2. **Information/signs/brochures** More information needed, e.g., where is the entrance, how to meet with dolphins (it seemed that most people did not know not to touch them.)

* Are there any translated materials in foreign languages? None

3. **Activities**

Wildlife watching (dolphins, dugongs, turtles, pelicans etc), swimming, snorkelling, sailing on the boats, photography and relaxing on the beach

Issue discussed:

Approx. 105,000 tourists visited Monkey Mia in 1995. 22,000 people were coming from overseas, and about 30% of overseas visitors were Japanese/Asian tourists. Numbers of visitors have been just stable for these five years, while the number of international visitor's increasing. There are approximately 40 licensed commercial operators. Busy days in a week are Tuesday, Thursday and Saturday. Most of coach tours arrive at 7:30 am and leave at 10:30 am.

According to Malcolm Dair, Assistance Manager of Monkey Mia Dolphin Resort, over 60% of Japanese tourists were backpackers. It was an unexpected high percentage. I did meet Japanese tourists everyday at Monkey Mia, most of them were young people. Some stayed overnight at Shark Bay area. Some were coming by day trip. The package tour price was \$290 to over \$500 dollars per person.

Area itself was so wonderful, with beautiful beaches and attractive wildlife. But there might be a problem for this accommodation as an international resort. For backpackers and campers, this may be a perfect place. However, if someone expects an international resort type, this may not be very suitable place. Such travellers may expect gorgeous pools, luxurious restaurants etc. But, because of this, it is very natural, clean and beautiful. This is a difficult problem gaining a balance between development and nature conservation.

Remarks/Recommendations:

According to rangers at Monkey Mia, *dolphins' visit is predictable in winter period, but not in summer period.* I did not know this information, prior to visiting. I believe it should be informed properly by tour operators, publications and/or any other ways. We were lucky enough to meet with dolphins. However, some Japanese tourists were complaining. They believed that they could definitely meet with dolphins, if they come to Monkey Mia. They had been waiting for whole morning without any luck and returned with disappointment. If they had known such information, they might have taken boat ride to see dolphins and just relaxed on the beach.

The admission fee (day pass) into Monkey Mia was \$5. But, there was long-term pass available with the cost of \$8. (I have known such existence today, 18/12/1996.) I think it should be properly announced to the tourists. Or rangers at least should ask to the independent visitors how long they stay in shark bay area.

There have been some misunderstandings for Japanese tourists, due to the language barrier. I have heard lots of complaints as follows.

- They were not allowed to touch dolphins.
- They could not get closer to dolphins.
- They could not meet with dolphins.

I suggest that translation of these important requirements is an imperative.

Potentiality for Japanese/Asian tourism:

High level of expectation, although Shark Bay area is far from Perth. I believe that it is worth while to visit this area and experience the world heritage, including dolphins, dugongs, shell beach, stromatolites and so forth.

However, as mentioned above, proper information is necessary.

Summary Report

Date: November 29 (Fri) & December 1 (Sun), 1996

Name of Place visited: Francois Peron National Park

Person in contact: Paul Brown, District Manager, Gascoyne Region

Location: Approximately 600 kilometres north from Perth

Travelling time: 15 minutes from Denham to Peron Homestead
2 hours from Denham to Cape Peron North
(It takes one and half hours on domestic flight from Perth to Shark Bay airport.)

Check list:

1. Facilities Reasonable
2. Information/signs/brochures Reasonable
 - * Are there any translated materials in foreign languages? None
3. Activities

Sightseeing, taking natural hot springs (hot tub), picnicking, walking, fishing, and photography

Issue discussed:

Only approximately 3% of the tourists in Monkey Mia visit Francois Peron National Park, although natural hot springs are the most promising. If this Homestead is renovated, it can be more attractive.

Remarks/Recommendations:

The road between Homestead and Cape Peron North was not in good condition, as it is a 4WD track and not designed for 2WD access. Japanese drivers might cause some trouble with the cars on these roads, as they are not accustomed to drive on such roads. I recommend some instructions, in case they get into troubles, e.g., being stuck in the sand, to be informed on registration application and/or signboard.

It is rare and wonderful opportunity to take a natural hot tub in the wild, frequently viewing Emus. (I had seen ten emus while I had taken it.) But, it seems not many tourists are aware of it. Some Japanese are extremely keen on natural hot bath. Thus, further promotion recommended.

In addition, there is a magnificent variety of wildlife. Thorn devil was just lying on the middle of the road, which was like a dinosaur. Lots of species of birds were flying. It can be also very attractive aspect and should be promoted as a highlight.

Potentiality for Japanese/Asian tourism:

Medium level of expectation, although I believe that hot tub was so wonderful. If Peron Homestead is renovated, potentiality will be much higher.

Summary Report

Date: 15 January, 1997

Name of Place visited: Lane Pool Reserve

Person in contact: Alan Sands, Program Leader, Recreation and Tourism, Swan Region

Location: 100 km south of Perth, just south of Dwellingup

Travelling time: 1 hour 30 minutes from Perth

Check list:

1. Facilities good
2. Information/signs/brochures good
3. Activities

Bushwalking, camping (booking with the local ranger), picnicking, swimming, canoeing, wildlife observation, and photography

Issue discussed:

This camping sites are extremely popular during holiday periods. There was a care taker on the site. It was well organised.

A camp primarily for schoolchildren has been established at Icy Creek near Nanga. In addition, the Nanga Bush Camp offers accommodation.

This river is suitable for canoeing and swimming. However, it is risky after the winter rains, because the water rapids, snags and the amount of water rolling down the river.

Remarks/Recommendations:

It was interesting to see King Jarrah. It was much bigger than I expected, when we got closer. Obviously, this King Jarrah has got longer history than Australian white history.

It was a beautiful area within two hours drive from Perth. This place can be suitable for family recreation.

Potentiality for Japanese/Asian tourism:

Medium level expectation. It may be more suitable for domestic market, as for picnicking, camping etc, as time is very limited for ordinary international tourists. And they look for something different and extraordinary from their daily life. But for backpackers and/or working holiday visa holders, this place can be fun.

Summary Report

Date: 19 February, 1997

Name of Place visited: John Forest National Park

Person in contact: Alan Sands, Program Leader, Recreation and Tourism, Swan Region

Location: About 26 km east of Perth

Travelling time: 30 minutes from Perth

Check list:

1. **Facilities** affordable (may need renovation.)
2. **Information/signs/brochures** good
3. **Activities**

Picnicking, bushwalking, cycling, horseback riding, wildlife observation and photography

Issue discussed:

John Forrest is the oldest park in Western Australia. And some facilities are fairly old, so they may need some renovation.

Although it is very close to the City, this park remains lots of underdeveloped areas, which are home to a variety of plants and wildlife.

This park was well organised for walk trails, mountain bike trails and horse trails.

Remarks/Recommendations:

I believe this park would be much beautiful to make renovation. But, I understand that it is very costly. It must be very difficult to maintain high standard of facilities.

There were panoramic views of Perth from the lookout, and it was such a pleasant and scenic drive from Perth.

Potentiality for Japanese/Asian tourism:

Midium level of expectation, as it is very close to Perth. Although, this is a kind of ordinary park, and may need some renovation. For bicycle riders and/or horseback riders, it may be interesting to go on trails.

Summary Report

Date: 19 February, 1997

Name of Place visited: The Hills Forest

Person in contact: Alan Sands. Program Leader. Recreation and Tourism. Swan Region

Location: Approx. 30 km east of Perth

Travelling time: Half an hour's drive from Perth

Check list:

1. **Facilities** excellent
2. **Information/signs/brochures** excellent
3. **Activities**

The wide range of activities is available at the Hills Forest, e.g., bush walks, night time explorations, aboriginal dance, wildflower observation, bushcooking and so forth. Over 30 programmes are usually offered to the public.

Issue discussed:

The Hills Forest covers some 80,000 hectares, which includes State forest, five national parks (John Forrest, Gooseberry Hill, Greenmount, Kalamunda and Lesmurdie Falls), the Mt Dale conservation park and the Mundaring Weir area.

In the Hills Forest, there are amphitheatre, conference rooms and, some picnic and four (4) camping spots. It has been well organised.

A bush adventure program is conducted by the Hills Forest Activity Centre, some programs are especially arranged for school educational activities.

Remarks/Recommendations:

I believe that activities at the Hills Forest are wonderful. Everyone can experience unique and interesting programs with reasonable costs. I am, personally, interested in Aboriginal Dreaming.

One of Japanese group (approx. 80 school children, around 12 to 15 years old with some teachers) is planning to visit Perth in late July this year. They requested CALM's support for conducting seminars and visiting the National Park. I believe that the Hills Forest may be a perfect place for this situation. There are lots of activity oriented interesting programs and there is a conference room, as well as an amphitheatre for the purpose of lecture/seminar. Especially school children in such ages, need some stimulation. I have been in contact with Larissa Vanstien at the Hills Forest Activity Centre, discussing programs.

Potentiality for Japanese/Asian tourism:

High level expectation. This place can offer lots of activities for international travellers, who will be able to have interesting and unique experience. However, definitely, more promotional and marketing activity is needed.

Summary Report

Date: 19 February, 1997

Name of Place visited: Walyunga National Park

Person in contact: Alan Sands. Program Leader. Recreation and Tourism. Swan Region

Location: 40 km north-east of Perth

Travelling time: 1 hour from Perth

Check list:

1. Facilities good
2. Information/signs/brochures good
3. Activities

Picnicking, camping (by arrangement with the Ranger), bushwalking, wildlife observation, canoeing, and photography

Issue discussed:

This park is open at 8 am and closed at 6 pm, which is unusual as a National Park. The park is protected from unsociably behaved people.

This park's main features are the wild flowers in winter and spring, the native animals, and wonderful valley scenery. This valley is suitable for canoeing, and this canoeing course is part of the annual Avon Descent race.

Remarks/Recommendations:

According to the Aboriginal people, Walyunga is kind of one of their sacred places. I believe that Aboriginal culture is totally different from Australian culture. It should be retained, recognised and respected.

However, it is unfortunate that there was less information about aboriginal culture in this park or in the pamphlet and/or brochure. I think people could be properly educated through these information.

Potentiality for Japanese/Asian tourism:

This park is suitable for family recreation site. As for international tourists' destination, it could be low level of expectation. It may be good for special interests tour, e.g., canoeing and wildflower observation.

Summary Report

Date: 6 February 1997

Name of Place visited: Leschenault Peninsula Conservation Park

Person in contact: Peter Henderson. Tours/Recreation Officer. Central Forest Region

Location: Approximately 200 kilometres from Perth

Travelling time: 2 hours and a half

Check list:

1. Facilities good
2. Information/signs/brochures more information is needed
3. Activities

Sightseeing, picnicking, camping, viewing wildlife (kangaroos) and fishing

Issue discussed:

This park was reopened quite recently, therefore, it is not very well known. It is like a secret park.

I did not know that rabbits are sometimes harmful animals to destroy grasses etc. Some areas have still had fences to protect grounds from rabbits. I could easily recognise the difference.

Remarks/Recommendations:

This conservation park is fairly close to Bunbury. It may be a good resting place, e.g., picnicking, for local people in Bunbury.

As probably this park was closed for a while, nearly No information can be found in pamphlets and/or brochures. In the near future, at least some information can be available to the public.

Potentiality for Japanese/Asian tourism:

This park might be low level of expectation, because, this is somewhat featureless. The lack of a special feature limits its potential, as an international tourist destination.

Summary Report

Date: 6 February, 1997

Name of Place visited: Wellington Discovery Forest

Person in contact: Peter Henderson. Program Leader. Tours & Recreation. Central Forest Region. Bunbury

Location: 170 km from Perth

Travelling time: Two hours from Perth

Check list:

2. Information/signs/brochures good

3. Activities

Sightseeing, nature study, swimming, picnicking, camping, walking, marron, and photography

Issue discussed:

Visited Wellington Forest (Potters gorge, Wellington Reservoir, Honeymoon Pool), Wellington Discovery Forest and Wellington Mills Forest Cottages (Ecotel).

The Discovery Centre building was under construction at Wellington Discovery Forest site. It provides interpretive displays and a meeting room.

Remarks/Recommendations:

In the late afternoon, there were lots of wild kangaroos at Ecotel site. They were so friendly and seemed to like human-being. It had just amazing and wonderful experience, and, I believe, every tourist can enjoy these atmosphere. I would like to stay at this camp in the near future.

Potentiality for Japanese/Asian tourism:

Medium to high level of expectation. (But, I cannot mention anything about Ecotel accommodation, as I have not stayed yet.) People can have superb experience to meet with wild kangaroos at Ecotel site. It is not zoo or wildlife park. But, there is nearly no information available about this site. Obviously, more promotional/marketing efforts are necessary. This will be undertaken by the proprietor.

Summary Report

Date: 7 February, 1997

Name of Place visited: Tuart Forrest National Park

Person in contact: Peter Henderson. Tours/Recreation Officer. Central Forest Region. Bunbury

Location: Approximately 230 km south from Perth

Travelling time: Two and half hours from Perth

Check list:

1. **Facilities** may need toilets.
2. **Information/signs/brochures** good
3. **Activities**
 Picnicking, Bushwalking and nature study

Issue discussed:

This park is one of W.A.'s newest national parks. And it is a special park, which protect the largest remaining pure forest of tuart in the state.

Remarks/Recommendations:

In this Tuart Forest National Park, there is a "Possum Trail", which is especially arranged for self guided Night Spotlighting Tour. (Please see the note for "Night Spotlighting Tour".) I believe that this kind of activity is unique and very interesting for the international travellers. However, no such information can be found in CALM's guide books nor through Tourist Bureau. I have to say, at least, this information should be available to the public.

Potentiality for Japanese/Asian tourism:

Medium level of experience. Night Spotlighting Tour can be very interesting for Japanese/Asian tourists, although they may have to stay overnight in Busselton or Bunbury area. As previously mentioned, information is definitely necessary. None of the Japanese tour operators know of the Possum Trail.

Summary Report

Date: February 7, 1997

Name of Place visited Leeuwin-Naturaliste National Park

Person in contact Peter Henderson, Tours/Recreation Officer, Central Forest Region, Bunbury

Location: Approximately 300 kilometres from Perth

Travelling time: Approximately 3 hours and a half

Check list:

1. Facilities good
2. Information/signs/brochures good
3. Activities

Bushwalk, nature observation, swimming, snorkel/scuba diving, surfing, boating, fishing, picnicking, camping, sightseeing and photography

Issue discussed:

Visited Cape Naturaliste, Bunker Bay, Canal Rocks, Ellensbrook, Calgardup Adventure Cave, Boranup Karri Forest, and Caveworks-Eco Museum.

Approximate visitors were as follows.

61,000 - Bunker Bay
72,000 - Canal Rocks
50,000 - Ellensbrook
30,000 - Boranup Karri Forest

We were discussing the importance of the pre-visit information. When people plan the travelling schedule, we often go to the tourist bureau and/or other related organisation to obtain such information. Although CALM produces such deluxe and beautiful books or individual park leaflets, there is no basic brochure, which covers information for major national/marine parks (and reserves) with map.

Remarks/Recommendations:

I always appreciate the beauty of South West, i.e., beautiful scenery, nature, forests, waters, sands and so forth. In addition, this area is approximately within three hours drive distance from Perth. It is an ideal place for one or two overnight(s) stay.

Although Bunker Bay trail is fun, and it is possible to view whales rounding the Cape in spring from the boardwalk, halfway trail is sandy, rocky, slippery and a little bit dangerous for elder people and children. Hopefully trails from the lighthouse to the Bunker Bay could be covered by boardwalk in the near future.

Summary Report

Date: February 21, 1997

Name of Place visited: Shannon National Park

Person in contact: Cliff Winfield, Regional Recreation and Tourism Leader,
Southern Forest Region, Manjimup

Location: 53 km south-east of Manjimup

Travelling time: 45 minutes from Manjimup

Check list:

1. Facilities good
2. Information/signs/brochures very good
3. Activities

Sightseeing, nature study, camping, picnicking, bushwalking, fishing, and photography

Issue discussed:

"Great Forest Trees Drive Tour" was so beautiful with magnificent views of Karri trees, but, its guidebook was not very impressive for me. Although, it was very handy, only limited information (roads) was covered on one page, so it was very difficult for me to follow the coming and/or going routes.

Information is provided, through a radio channel. It was an interesting idea, although we have to stop at certain places to listen to it. The voices were fairly clear, and good condition and it contains lots of information.

Remarks/Recommendations:

There was tent sites, which were being taken care of by volunteers. I am so impressed by such a good system. And it was nicely organised.

I believe that above mentioned radio information service is a key to the translation, if such demands increase. I really like this audio type information. I hope to listen to such information in foreign languages in the near future.

Potentiality for Japanese/Asian tourism:

Medium level of expectation. Great Forest Tree Drive is wonderful, however, this area is fairly far away from Perth. But, If they could stay a few days in South West, they can enjoy deep forests with lots of activities. Therefore, it is depends on the tourist's length of stay in Western Australia.

As previously mentioned, I would really recommend the pre-visit information and/or activity guide in the national/marine parks and reserves. Local people may be knowledgeable, but, the tourists should need such information beforehand and may carry it with them. Of course, CD Rom and/or Internet are efficient tools, however, such electronic communications have not been well developed in Japan as yet.

Potentiality for Japanese/Asian tourism:

High level of expectation. This park include lots of interesting sites, e.g., Caves, Karri Forrest and dramatic coastal senary. Japanese/Asian tourists can enjoy such senary and atmosphere. I would definitely recommend overnight stay in this area, therefore, it may not be suitable for very busy tourists. And of course, more promotional/marketing activities are essential.

Summary Report

Date: 21 February, 1997

Name of Place visited: Walpole Nornalup National Park
(Please refer to the report of Valley of the Giants)

Person in contact: Cliff Winfield, Regional Recreation and Tourism Leader,
Southern Forest Region, Manjimup

Location: Approximately 120 km south east of Manjimup

Travelling time: Approximately 1 and half hours from Manjimup

Check list:

1. Facilities Good
2. Information/signs/brochures Good
3. Activities

Sightseeing, scenic drives, picnicking, camping, canoeing,
bushwalking, fishing, marron, and photography

Issue discussed:

There are many scenic drives near Walpole to enjoy. We can travel through big karri trees and climb to the top of the trees. We can also experience ocean viewing, which was so impressive.

Visited Hill Top Lookout, Circular Pool Picnic Area and Conspicuous Cliff. At Conspicuous Cliff, there was a boardwalk to the beach. And boardwalk construction for hill lookout had been undertaking.

Remarks/Recommendations:

Although "the Tree Top Walk" was the most famous, there were many other beautiful picnic sites, which were shady and so peaceful. They are a kind of hiding charm.

Potentiality for Japanese/Asian tourism:

Including Valley of Giants, level of expectation is high. It is unique and superb experience, in addition, other area is also so beautiful. Especially, Japanese people love trees and forests.

Summary Report

Date: 21 February, 1997

Name of Place visited: Valley of the Giants (the Tree Top Walk and the Ancient Empire)

(Please refer to the report of Walpole Nornalup National Park)

Person in contact: Christine Wrengh, Valley of the Giants Operation Manager, & Cliff Winfield, Regional Recreation and Tourism Leader, Southern Forest Region, Manjimup

Location: 120 km south east of Manjimup

Travelling time: One and half hours from Manjimup and 15 minutes from Walpole

Check list:

1. Facilities excellent
2. Information/signs/brochures excellent
3. Activities
Nature study, bushwalk, scenic walk and photography

Issue discussed:

The survey has been conducted (its form is attached) for the visitors to the Tree Top Walk. Thus, I was discussing with Chris (Operation Manager) to distribute the Japanese tourism survey to appropriate tourists. She accepted my offer. 100 copies, as well as 50 copies of translation were sent. I do hope that there will be some reply.

During before and after Christmas period, Asian visitors were increased, according to Chris. The peak periods for Japanese travellers are New year holidays (around 28 December through 4 January) and Golden week period (around 29 April through 10 May). Lots of Japanese tourists often go abroad using these opportunities.

Remarks/Recommendations:

Although this location is inconvenient (far from Perth) for the international travellers, I believe this place is promising. First of all, there is NO such unique place in Japan nor even in the world, (walk on the tree top), secondly, everyone can experience its atmosphere, despite of age, sex, and ability. Lastly, scents of trees and leafs and magnificent view of forests and ocean can be enjoyed.

The Ancient Empire was also very enjoyable walk. Boardwalk can always welcome and invite the people to walk in.

Potentiality for Japanese/Asian tourism:

High level of expectation. I believe that more marketing/promotional activities are definitely needed towards international tourists.



VISITOR SURVEY

Thank-you for spending five minutes filling out this survey.

The impressions of our visitors are important in helping us provide a world class service and facility.

1. Please indicate your home town and state:

2. What age group do you fall into? Tick the appropriate box:

0-14 ☐ 15-25 ☐ 26-35 ☐ 36-45 ☐ 46-55 ☐ 56-65 ☐
66-75 ☐ 76-85 ☐ 86 & over ☐

3. Are you travelling alone? ☐

Or a member of a family group? ☐

Or with friends? ☐

Other, ☐ please specify:

Tick the appropriate box.

4. In what town are you spending the night?

5. How many nights will you be spending there?

6. Where are you travelling to next?

7. What other places have you visited/plan to visit in Walpole-Nornalup National Park?

8. What activities do you enjoy whilst on holidays?

9. How did you find out about the Valley of the Giants?

- | | | | |
|--------------------------|--------------------------|------------------------|--------------------------|
| Through brochure | <input type="checkbox"/> | Through local business | <input type="checkbox"/> |
| Through tourist operator | <input type="checkbox"/> | Through news article | <input type="checkbox"/> |
| Through Tourist Bureau | <input type="checkbox"/> | Word of mouth | <input type="checkbox"/> |
| Through CALM office | <input type="checkbox"/> | Other (please specify) | <input type="checkbox"/> |

10. On a scale of 1(not satisfactory) to 5(most satisfactory) how would you rate:

The Valley of the Giants facility 1 2 3 4 5

The Tree Top Walk 1 2 3 4 5

The Ancient Empire 1 2 3 4 5

Directional signage 1 2 3 4 5

Interpretion/Information signage 1 2 3 4 5

Souvenirs 1 2 3 4 5

Staff assistance 1 2 3 4 5

9. Do you have any comments you would like to make about the Valley of the Giants?

10. Are you interested in receiving regular newsletters about the Valley of the Giants?

If yes please write your name and address below.

Thank-you



Summary Report

Date: 23 February 1997

Name of Place visited: Night Spotlighting Tour (Possum Trail)
(Please refer to the report of Tuart Forest National Park)

Person in contact: Greg Voigt, Operations Officer, Busselton District Office, in Central Forest Region

Location: 15 km east of Busselton on Bussel Highway, which is approximately 230 kilometres south from Perth

Travelling time: 10 minutes from Busselton

Check list:

1. **Facilities** Toilet might be necessary.
2. **Information/signs/brochures** good
3. **Activities** Bushwalk and viewing wildlife (possums)

Issue discussed:

Approx. 20 Japanese representatives from Sugito Town in Saitama Prefecture, which is a sister town for Busselton shire, were visiting Busselton and experienced Possum Trail. All of visitors excited and enjoyed a lot. They had a fun to find possums, and fortunately could find one ringtail possum and two brushtail possums in about 40 minutes.

I did interpretation and handed tourist questionnaires to all participants. I am interested in having their comments for this specific activity.

Remarks/Recommendations:

This was also my first experience to do night spotlighting tour. I do believe that this is an interesting and very promising opportunity. But, I do recommend guided tour for these activities. Otherwise, we might miss such viewing opportunities or might be lost the way. And this kind of tour can be more suitable for the group.

I believe we should prepare and provide this kind of activity information to the inbound tour operators, as well as individual travellers. as it seems that they do not have enough knowledge about it.

Potentiality for Japanese/Asian tourism:

Medium to high level of expectation. This night spotlighting tour can attract the international tourists, of course, proper explanation and guidance are essential. Also more information about this activity should be provided to the public.

Summary Report

Date: 19 March, 1997

Name of Place visited: Porongurup National Park

Person in contact: Terry Passmore, Regional Leader Tourism & Recreation, South Coast Region, Albany-Regional

Location: 40 km north of Albany

Travelling time 40 minutes from Albany

Check list:

1. Facilities Good
2. Information/signs/brochures Good
3. Activities

Sightseeing, birds watching, nature study, picnicking, bushwalking, walking, rock climbing, and photography

Issue discussed:

I met with Terry at the airport at 7:30 am and soon visited Porongurup National Park early in the morning. It was so quiet and peaceful, we could only hear birds' singing and the sound of flies. After observation of "Tree in the Rock", we walked along "Bolgenup Heritage Trail". It was a short walk, 600 m circuit (about 30 minutes), and very comfortable.

Remarks/Recommendations:

I always think more signs are needed on the paths and/or trails. It is easy to get lost for the strangers. Or more detailed maps/guides for the paths and/or trails would be necessary.

As it was such a very early morning, "Tree in the Rock" was so special. We could only hear singing of birds and sounds of leaves. This place is perfect for experience of viewing forests and/or picnic.

Potentiality for Japanese/Asian tourism:

Low to medium level of expectation for international tourists. Although this park is so beautiful, it is not very special nor spectacular. It may be suitable for family picnicking and/or walking/bushwalking.

Summary Report

Date: 19 March, 1997

Name of Place visited: Two Peoples Bay Nature Reserve

Person in contact: Terry Passmore, Regional Leader Tourism & Recreation, South Coast Region, Albany-Regional

Location: 20 km north east of Albany

Travelling time: 30 minutes from Albany

Check list:

1. **Facilities** Affordable
2. **Information/signs/brochures** More information needed.
3. **Activities**

Sightseeing, birds watching, nature study, picnicking, bushwalking, walking and photography

Issue discussed:

This reserve is considered as one of the most important reserve in Australia, as several rare species of birds survive.

Visited Little Beach, which was so beautiful and walked along "Baie Des Deux Peuples Heritage Trail". Facilities are minimal, but, it was nice site for picnicking and BBQ's. Toilets were reasonably clean.

This reserve might be changed to the National Park.

Remarks/Recommendations:

It does require more information about this reserve itself and its inhabitants for the visitors. We were talking about computerised voice machine providing information in several languages. It is a dream, but, accessible dream. In this case, I recommended conducting a small survey to examine the most common foreign languages in the South Coast region, as well as the necessity of its translation.

At any rate I believe translation for (at least) brochures and so forth is essential.

Potentiality for Japanese/Asian tourism:

Medium level of expectation, if more proper information is available.

Summary Report

Date: 19 March, 1997

Name of Place visited: Torndirrup National Park

Person in contact: Terry Passmore. Regional Leader Tourism & Recreation. South Coast Region. Albany-Regional

Location: 10 km south of Albany

Travelling time: 15 minutes from Albany

Check list:

1. Facilities No facilities
2. Information/signs/brochures More information needed.
3. Activities
Sightseeing, rock climbing. nature study, walking and photography

Issue discussed:

Visited The Gap, Natural Bridge, Stony Hill and The Salmon Holes. Extraordinary rock formation and beautiful coastal senary. Stony Hill Heritage Trail was nice short walk and its viewing was excellent.

Approx. 200,000 visitors were visiting the Gap last year. It is one of the most visited national parks in the State.

Remarks/Recommendations:

This park was easy to access and such dynamic senary. And not much information is needed. But, the Heritage Trail at the Stony Hill may need more signs (I surmise), as I wondered where to go on next on the trail.

This is a good place for just short visit, and Japanese people like such quick looking.

Potentiality for Japanese/Asian tourism:

High level of expectation. Especially The Gap and Natural Bridge were so spectacular. I believe everyone can enjoy those dynamic views.

Summary Report

Date: 19 March, 1997

Name of Place visited: Stirling Range National Park

Person in contact: Terry Passmore, Regional Leader Tourism & Recreation, South Coast Region, Albany-Regional

Location: Approximately 75 km north east of Albany

Travelling time: Approximately one hour from Albany

Check list:

1. **Facilities** Fair
2. **Information/signs/brochures** More information needed.
3. **Activities**

Sightseeing, birds watching, nature study, picnicking, bushwalking, walking, rock climbing, camping and photography

Issue discussed:

This park is renowned for a mountain range and an extraordinary landscape.

We visited Bluff Knoll, the highest peak in the Stirling Range, as well as in the South West. It reaches 1 073 m above sea-level. We walked 1/3 of Bluff Knoll walk track, which was beautiful, then move to Toolbrunup Peak and Moingup Springs Camping Area.

Remarks/Recommendations:

Although this is a mountain range, they are not really mountains for the Japanese people. As we are surrounded by huge mountain ranges. (Approx. 1,000 m above sea level is referred as tableland in Japan.)

This park may be suitable for special interests tour. I would recommend this park for Spring and early Summer seasons to explore wild flowers, or maybe for bushwalking, and/or rock climbing.

Potentiality for Japanese/Asian tourism:

Low to medium level of expectation. Because it is not a high mountain range for Japanese nation. I think it may be better to promote as flora rich area, especially for Japanese tourists.

Summary Report

Date: 20 March, 1997

Name of Place visited: Fitzgerald River National Park

Person in contact: Terry Passmore. Regional Leader Tourism & Recreation. South Coast Region. Albany-Regional

Location: Approximately 180 km north east of Albany

Travelling time: Approximately 2 hours from either Albany or Esperance

Check list:

1. **Facilities** may need more toilets at several locations
2. **Information/signs/brochures** good
3. **Activities**

Sightseeing, wildflower viewing, nature study, walking, bushwalking, camping, fishing, and photography

Issue discussed:

The park is one of the most flora-rich conservation areas in Western Australia. Some 1,784 plant species have been identified. And many rare species of birds and animals are found. In addition, this park is a great place for whale viewing (from the land) in Spring and early Summer period.

Remarks/Recommendations:

This park was amazingly so huge. We visited Point Ann area, and walked along Point Ann Heritage Trail, and it took nearly for one full day, including transfer from and to Albany. Probably it may require a few days to explore most of this park. In this case, we need four wheel vehicles, as some roads are only accessible by such vehicles.

I think this park is suitable for special interest tours, e.g., observing wild flowers or viewing whales.

According to Thomas Cook representative (one of major Japanese inbound tour operators), they need detailed road map in this specific park and they desperately require more toilets in this park. As they sometimes bring the visitors especially for wildflower season. It was their major complaint.

Potentiality for Japanese/Asian tourism:

Low level of expectation, as this park is located at such an inconvenient location. It takes two and half hours from both Albany and Esperance. However, because of rich flora, birds and animals, this park is fitted to special interest tour.