



TOURISM TASMANIA

MAY 2025

INTERNATIONAL MARKET PROFILE

JAPANESE HIGH VALUE TRAVELLERS

UNDERSTANDING THE JAPANESE HIGH VALUE TRAVELLER*

THIS REPORT PROVIDES A SNAPSHOT OF THE KEY INSIGHTS;
FURTHER DETAIL IS AVAILABLE IN THE FULL RESEARCH REPORT

Why did we do this work?

Since the pandemic, Japanese travellers have been returning to international travel steadily, with growing interest in safe, nature-rich, and culturally unique destinations. While Australia is well-known and liked, Tasmania is often missed—even though it offers many of the things Japanese travellers are looking for.

By understanding what motivates them to travel, what they need, what holds them back, and how they currently behave, Tasmania can better meet their expectations and increase visitor spending.

How did we do this work?

We ran a 15-minute online survey with ~1000 high value travellers living in major cities in Japan in October 2024.

**High Value Traveller Definition: Household income of \$70,000+ and spends over \$160/day on accommodation, transport and leisure while travelling.*



Who are they...

- More than half of our Japanese travellers have a fluent English speaker in their household.
- Our Japanese HVTs have a strong propensity to travel to Australia, with 1 in 4 having visited in the past five years.
- However, Japanese HVTs represent only 2% of the Japanese population, making them a small target market.
- They are likely to travel in groups of 3–5, with their partner or as a family.
- They seek mainstream hotels or luxury accommodation and on average are staying just over a week (10 nights).

Implications for the Tasmanian Tourism industry

- Highlight family-friendly accommodation and activities to resonate with this market.
- High-end experiences, luxury accommodation and fine dining are all opportunities to pursue with Japanese HVT.
- Potential to use English across materials due to high levels of adoption.



Top 3 most important motivators for a holiday to Australia

1. Visiting places with immense natural beauty
2. Disconnecting and relaxing
3. Great food and drink experience

Top 3 activities of interest on holiday in Australia

1. Nature activities
2. Food & beverage
3. Relaxing activities

Top 3 Travel Values

1. Premium experiences
2. Fine dining experiences
3. Exclusive experiences

What matters to them...

Nature



Utilise outdoor nature activities as these have the strongest pull. Iconic status of natural landscapes can disproportionately boost destination awareness and provide a strong call to action for our Japanese HVTs. Nature experiences should emphasise peace, beauty, and where relevant, highlight local food, drink, or hero ingredients. Tasmania's pristine wilderness, seasonal beauty, and opportunities for mindful connection with nature—such as forest walks, wildlife encounters, and tranquil retreats will appeal to this group.

Relaxation



Japanese HVTs see travel as a way to unwind. They value authenticity and are drawn to peaceful, culturally rich places where they can slow down and take in their surroundings. Experiences that offer quiet beauty—like garden walks, hot springs, or time spent in nature with local hosts—are especially appealing. Dial up relaxation and connecting in nature with luxury experiences at the core.

Food & Drink



Our Japanese HVTs will be drawn to food experiences that reflect care, seasonality, and local produce. Highlight warm hospitality through unique meals and gourmet local cuisine. Quality ingredients and one-on-one interactions will feel premium for this group. Fresh and local should be at the core of our messaging around food, with our fish and seafood likely to have strong appeal amongst this group.

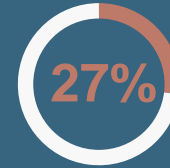
Luxury



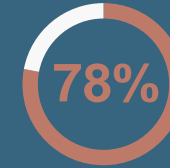
Japanese HVTs value high-end experiences that feel thoughtful and unique. They are willing to spend more on quality—especially when it comes to food, accommodation, and memorable moments. Think boutique stays with refined service, private access to nature or cultural sites, and premium dining that highlights seasonal local ingredients. Attention to detail and a sense of calm luxury are key to winning this audience.



The initial challenge to address is to build awareness of Tasmania



have travelled to Australia in the past five years.



would consider travelling here in the future.



are spontaneously aware of Tasmania.



Japanese HVTs are drawn to the iconic destinations of Australia, most attracted to the major cities (Sydney, Melbourne, Brisbane/Gold Coast). This group also has high consideration for areas associated with natural attractions (Cairns/Great Barrier Reef, Uluru/Ayers Rock/Darwin, Kangaroo Island). Celebrating nature will help to amplify your offer and appeal to our HVTs.

Address key barriers to unlock opportunity

Making things easier and more convenient

- Ease and convenience represent the largest barriers for Japanese HVTs; not knowing when to travel, how to get around, and having access to direct flights or simple booking methods.
- Leverage destination websites, travel brochures, guidebooks and travel agents as influential sources of inspiration for Japanese travellers to help reduce these barriers and provide clarity on what they can do and where they can do it. Remember nature should be at the heart of what we offer and promote.
- Our Japanese HVTs are looking for premium experiences in the way they eat, in the way they stay, and in the types of activities they do while travelling. Use relaxation in nature as well as food and drink experiences as your anchor point to attract these travellers as these are the top activities they are most interested in doing while visiting.