

Whether you're talking about a tourism destination, hotel, or travel brand, it's difficult to market across entire generations of travellers. It's more effective to identify psychographic segments - types of travellers who, regardless of age or gender, share similar attitudes, interests and behaviours.

Tourism Australia has embarked on a journey to transition from predominantly demographically defined and based target audiences across markets, to a global behavioural and attitudinal target audience. This transformation is underpinned by the development of the High Value Traveller (HVT) segment.

DEFINITION OF A HIGH VALUE TRAVELLER



TRAVEL LONG HAUL

Travels long haul (out of region) on a regular basis.



PREFERENCE FOR AUSTRALIA

Consideration to visit Australia in the short or long term.



KEY DRIVERS FOR DESTINATION CHOICE

Food and wine, aquatic and coastal, and nature and wildlife experiences are key drivers when choosing a holiday destination.



REPRESENT HIGH VALUE

Above average trip expenditure. Higher likelihood to stay longer. Higher likelihood to disperse further.

High Value Travellers (HVTs) are empowered and increasingly knowledgeable about the world around them. They know what they want, when they want it and where they want to get it. As such, HVTs view knowledge about a destination as fundamental to an enriching travel experience. That experience starts well before they board a ship or plane, but rather as they seek out and discover new travel content online.

So when it comes to travel, HVTs prefer authentic holidays where they can experience the local culture and get a taste of everyday life. With their eyes, ears and mind wide open, they travel to expand their horizons to become more knowledgeable of the world we live in. This means getting a taste for everything from the local cuisine to the natural surroundings. Especially when it's a destination they've not yet travelled to.



6.3M

High Value Travellers in Japan

of which
1.7M

are considering visiting Australia in the next four years

and a further
4.6M

not considering Australia in the next four years

DID YOU KNOW?



96% Enjoy escaping day-to-day life when travelling



95% Travel to enrich their knowledge of the world



95% Like to get a taste for the local cuisine when travelling



95% Travel to become more open-minded of the world



92% Feel now is the right time to travel to escape the pressures of modern life



represents

~41%

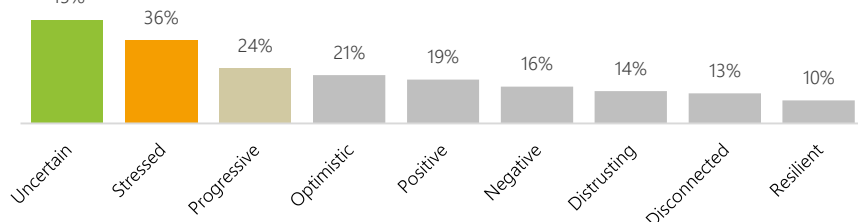
of the Japanese long haul travel market



Staying an average

6 NIGHTS

MOOD OF THE NATION

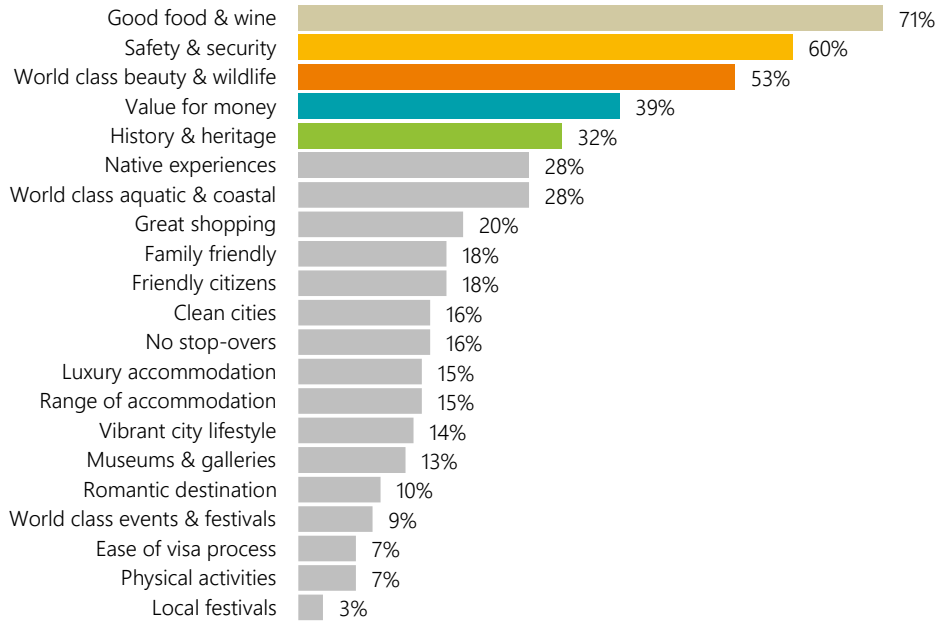


Spending

2-3X

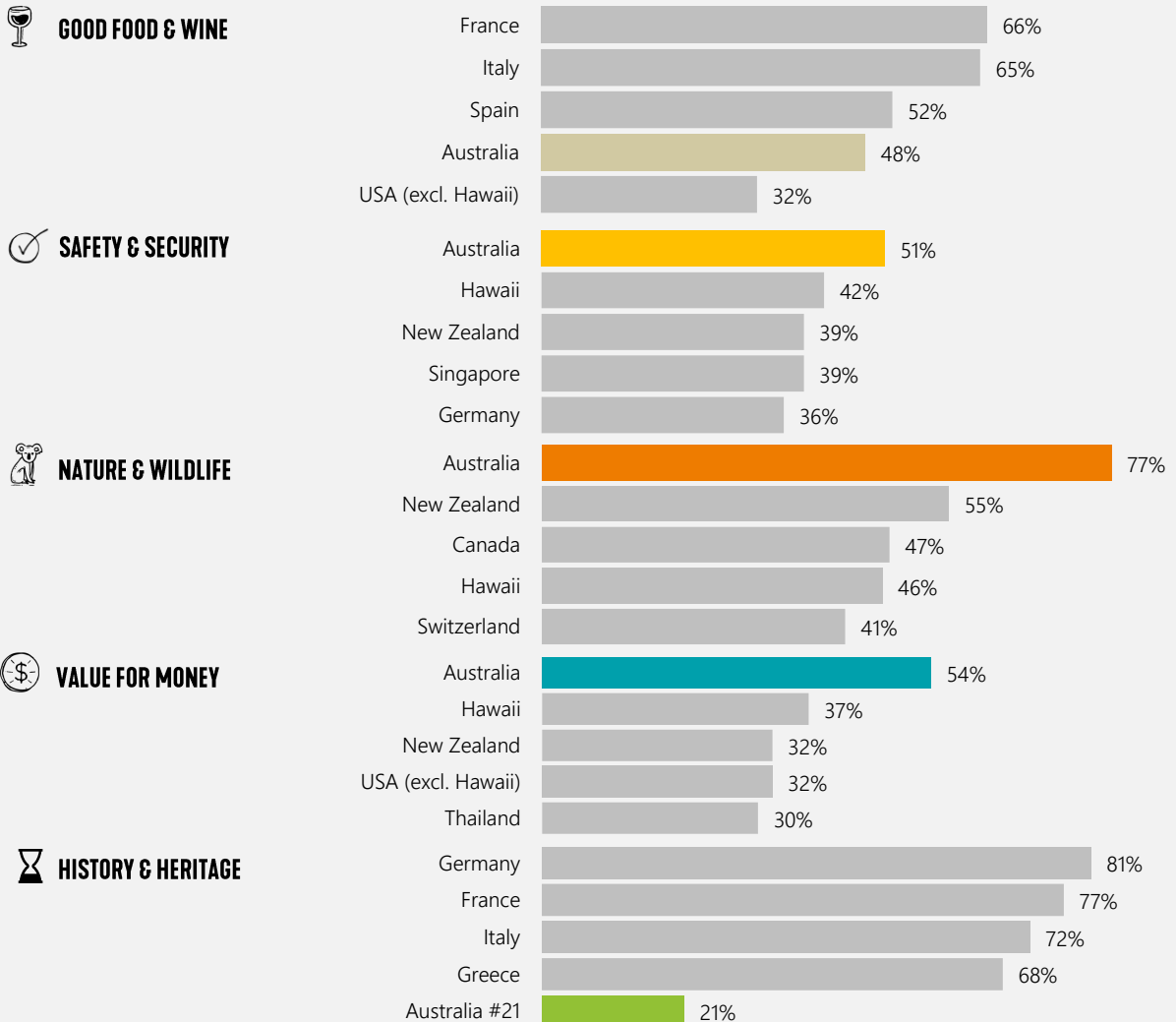
more than the average traveller₁

DRIVERS OF DESTINATION CHOICE



Read as: 71% of Japanese HVTs state good food and wine is the most important driver for destination choice.

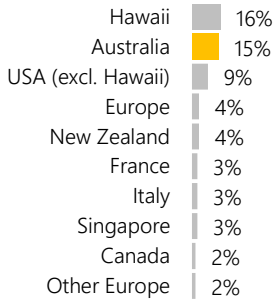
AUSTRALIA'S ASSOCIATION TO DRIVERS OF DESTINATION CHOICE



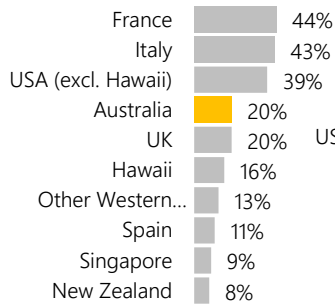
Read as: 48% of Japanese HVTs state Australia is the 4th most associated destination with good food and wine.

DEMAND FOR AUSTRALIA

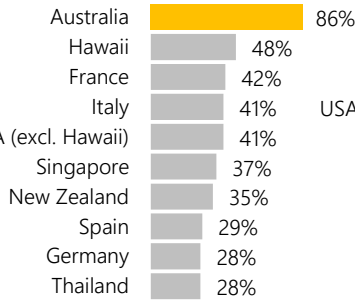
MOST DESIRABLE DESTINATIONS



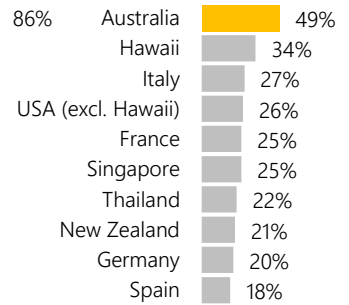
MOST FASHIONABLE DESTINATIONS



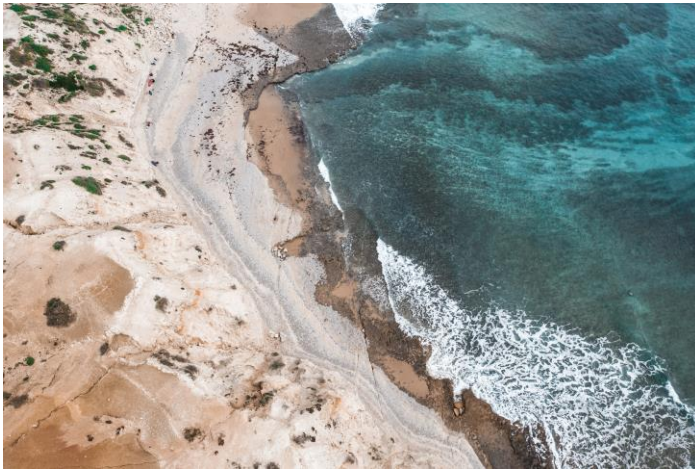
CONSIDERATION TO VISIT (IN THE NEXT 4 YEARS)



INTENTION TO VISIT (IN THE NEXT 2 YEARS)

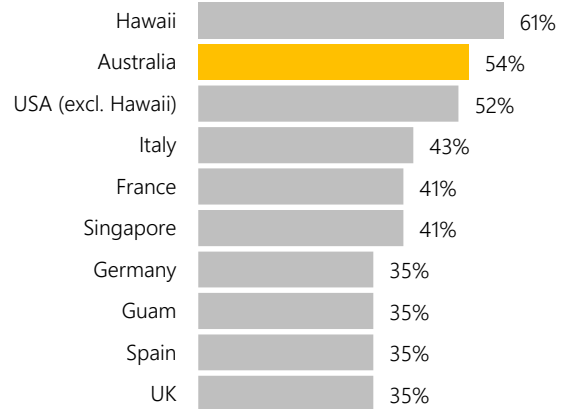


Read as: 86% of Japanese HVTs state Australia is their most considered destination.



Port Wilunga, South Australia

AWARENESS OF HOLIDAY EXPERIENCES



DRIVERS FOR CHOOSING AUSTRALIA



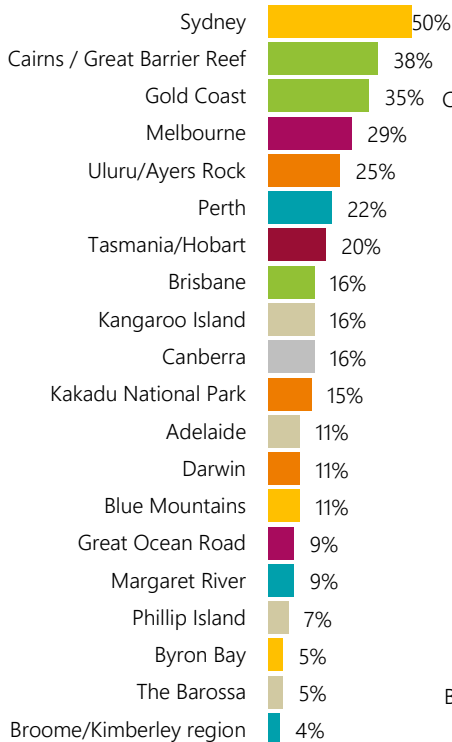
BARRIERS FOR NOT CHOOSING AUSTRALIA



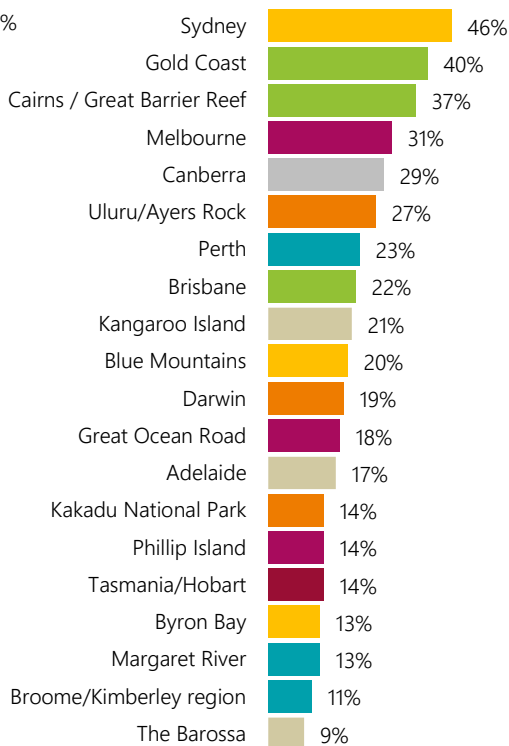
Read as: 56% of Japanese HVTs identify Australia as a destination that is a safe and friendly place to visit.

DEMAND FOR AUSTRALIA

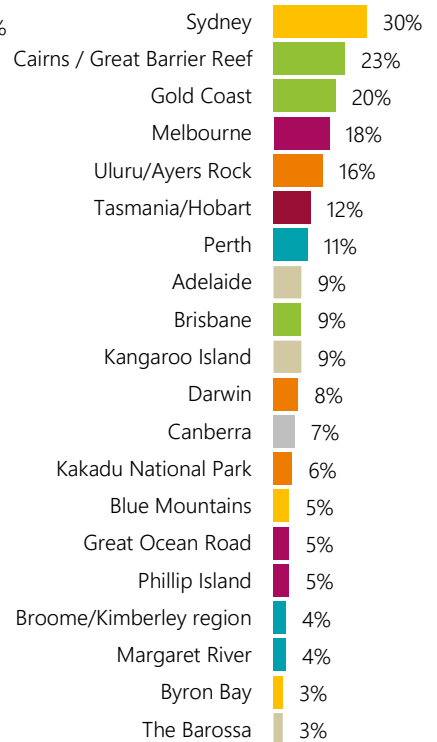
CONSIDERATION TO VISIT (IN THE NEXT 4 YEARS)



AWARENESS OF EXPERIENCES WITHIN AUSTRALIAN DESTINATIONS



INTENTION TO VISIT (IN THE NEXT 2 YEARS)



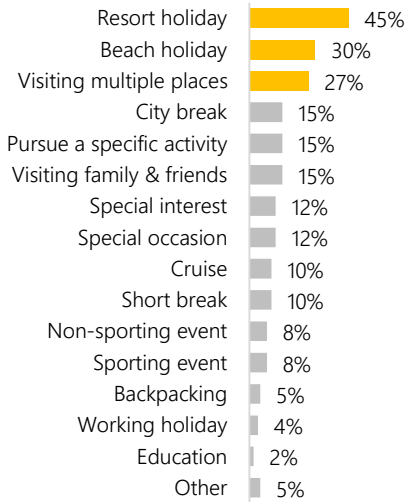
Read as: Of all Japanese HVTs considering Australia, 50% are considering visiting Sydney in the next 4 years.



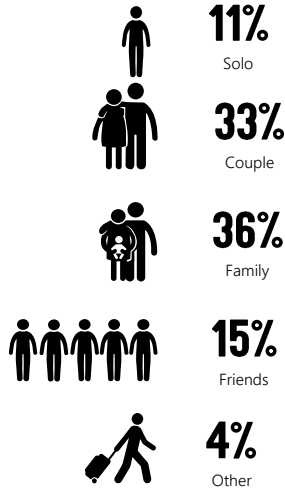
Nitmiluk National Park Edith Falls, Northern Territory

TRIP BEHAVIOUR

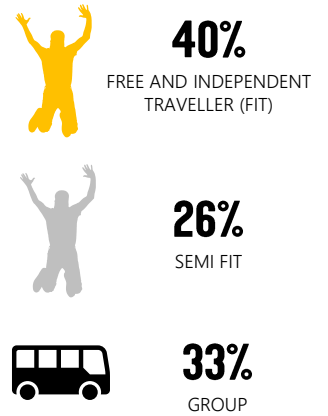
TRIP TYPE



TRAVEL PARTY

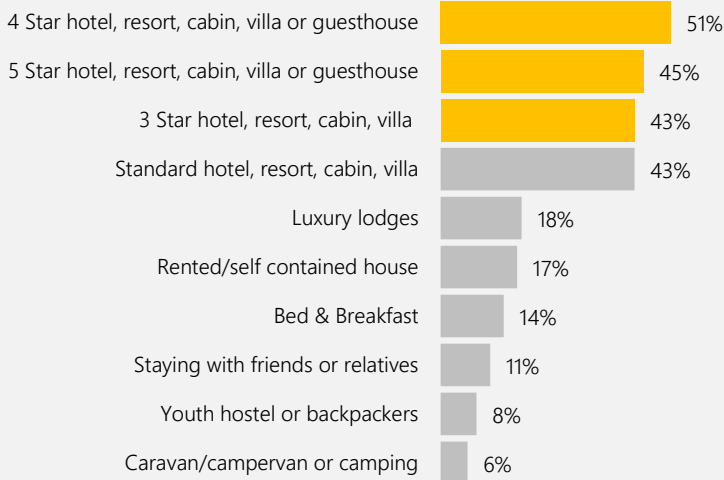


TRAVEL STYLE

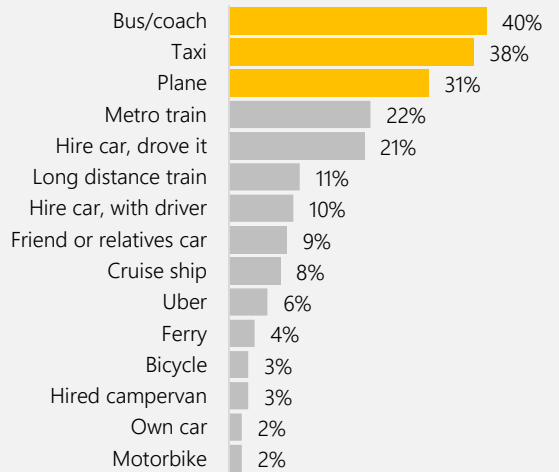


Read as: 45% of Japanese HVTs stated their last holiday was a resort holiday.

ACCOMMODATION TYPE

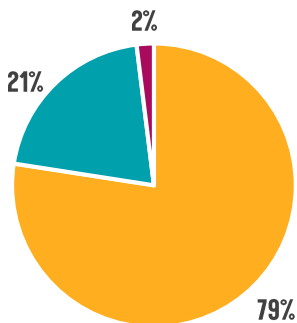


TRANSPORT



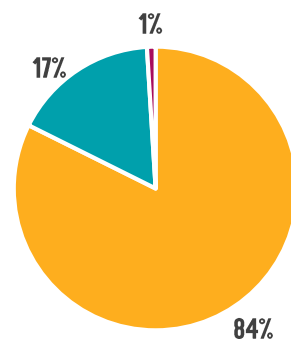
Read as: 51% of Japanese HVTs prefer 4-star accommodation.

BOOKING LEAD TIME FOR ACCOMMODATION



- Booked well in advance of my trip
- Booked not long before my trip
- Booked while on my trip

BOOKING LEAD TIME FOR FLIGHTS

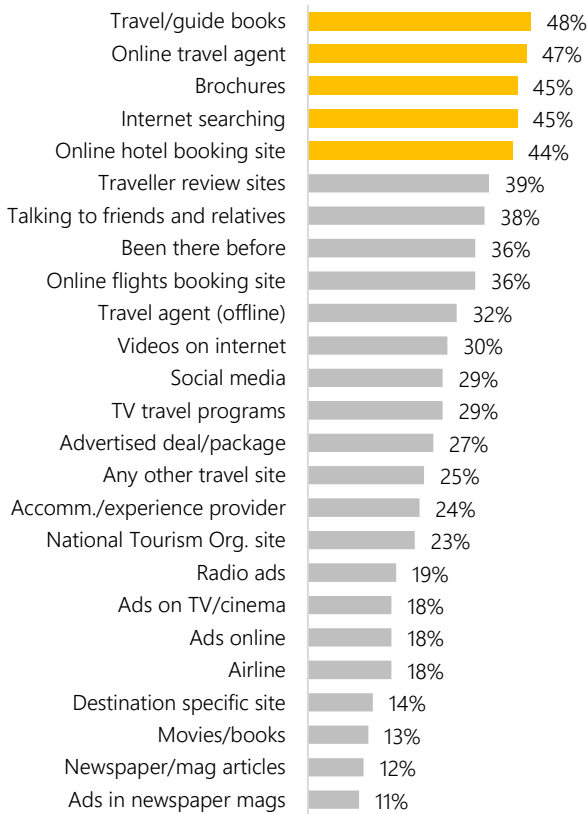


- Booked well in advance of my trip
- Booked not long before my trip
- Booked while on my trip

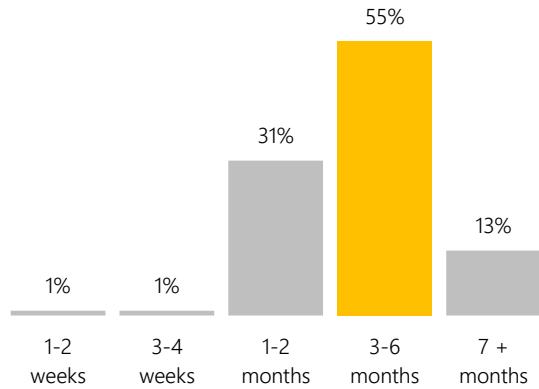
Read as 79% of Japanese HVTs book their accommodation well in advance.

PLANNING AND BOOKING

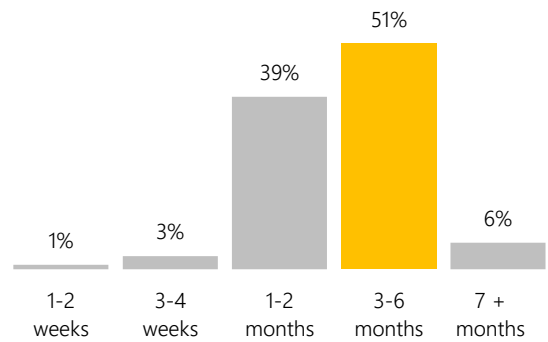
PLANNING SOURCES



DESTINATION CHOICE LEAD TIME

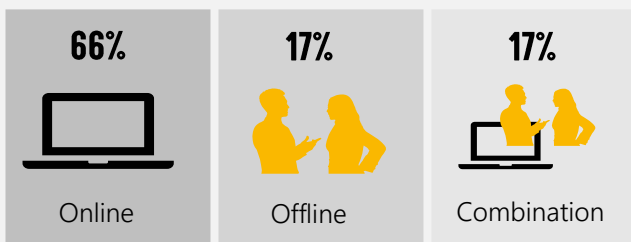


BOOKING LEAD TIME



Read as: 55% of Japanese HVTs select a destination 3-6 months before they travel.

ONLINE VS. OFFLINE BOOKING

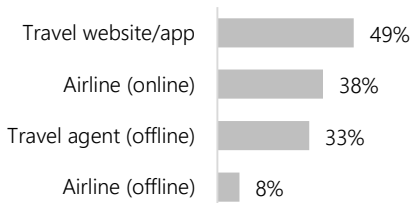


Read as: 66% of Japanese HVTs book online, while 17% book through offline sources.

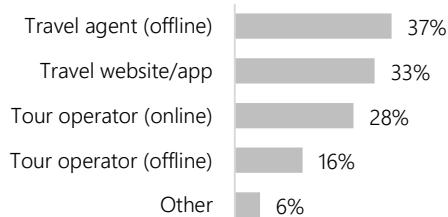
BOOKED PRIOR TO DEPARTURE



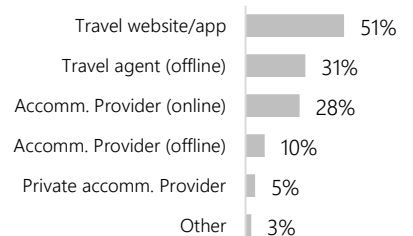
FLIGHT BOOKINGS



TOUR BOOKINGS



ACCOMODATION BOOKINGS



Read as: 49% of Japanese HVTs booked flights through a travel website/app on their last trip.