Japan
Market information about our Visitors and our Active Considerers
Past Visitor Research
This is information collected about those who have visited New Zealand. This is the source for the visitor snapshot infographics. It is primarily sourced from Statistics New Zealand (International Travel and Migration), and the Ministry of Business, Innovation and Employment (International Visitor Survey).

Throughout this document, any pages that refer to past visitor research will have a black background like this one.

Japan Past Visitors
Our Japanese visitors arrive throughout the year - they holiday during our peak but equally throughout the shoulder and winter periods. Interestingly this market also has a relatively high repeat visitation rate compared to other long haul markets.

Active Considerer Research
An Active Considerer is someone who is considering coming to New Zealand for their next holiday, and New Zealand is one of their top five destinations they would most like to visit. Tourism New Zealand commissions ongoing research (Kantar TNS), to understand who these people are, and what their motivations and barriers are; this research is the key information source for understanding our future visitors.

Throughout this document, any pages that refer to Active Considerer research will have a white background like this one.
JAPAN VISITOR SNAPSHOT

Japan is our sixth largest market and has a relatively high level of repeat visitors compared to other long haul markets.

PURPOSE OF VISIT

- Holiday: 68k
- Visiting friends/relatives: 11k
- Education: 7k
- Business: 7k
- Conferences: 2k
- Other: 7k

AVERAGE LENGTH OF STAY

- Holiday days: 621k
- Total days: 1.6m

HOLIDAY VISITORS

- First time visitors: 76%
- Repeat visitors: 24%

AVERAGE SPEND PER VISITOR

- Holiday: $3,180
- Total: $3,120

TOTAL MARKET CONTRIBUTION SPEND

- Holiday: $206m
- Total: $286m

VISITOR GROWTH TREND

Growth of arrivals out of Japan has moderated recently after a period of very strong growth.

JAPAN ARRIVALS (000)

TOTAL ARRIVALS +5% on LY

HOLIDAY ARRIVALS +1% on LY

2017-2023 JAPAN ARRIVALS FORECAST TO GROW 4.7% P.A. TO 140K

SOURCES: STATISTICS NEW ZEALAND INTERNATIONAL TRAVEL AND MIGRATION; MBIE INTERNATIONAL VISITOR FORECASTS; MBIE INTERNATIONAL VISITOR SURVEY; MBIE REGIONAL TOURISM ESTIMATES
JAPAN
VISITOR PROFILE
The majority of Japanese holiday visitors are Independent Professionals and Active Boomers.

AGE PROFILE OF HOLIDAY VISITORS

9%
YOUTH
Ages 18-24

39%
INDEPENDENT PROFESSIONALS
Ages 25-54

30%
ACTIVE BOOMERS
Ages 55-74

VISITOR ROUTES
The majority of Japanese holiday visitors fly direct from Japan.

73%
DIRECT FROM JAPAN

12% COME VIA AUSTRALIA
4% COME VIA SINGAPORE
JAPAN
VISITOR TRAVEL SEASONS
Japanese holiday visitor arrivals are well dispersed across the year.

SUMMER IS THE MOST POPULAR SEASON
BUT NEARLY HALF ARRIVE IN SHOULDER SEASONS

ARRIVE IN SUMMER 32%
ARRIVE IN AUTUMN 22%
ARRIVE IN WINTER 20%
ARRIVE IN SPRING 25%

VISITOR DESTINATIONS
Due to their shorter length of stay, Japanese travellers visit an average of two to three regions.

% OVERNIGHT VISITATION
% OF SPEND

NORTHLAND 68% 43%
AUCKLAND 38% 50%
WAIKATO 33% 19%
BAY OF PLENTY 33% 11%
GISBORNE 30% 11%
HAWKE'S BAY 30% 11%
MANAWATU-WHANGANUI 30% 11%
TASMAN 30% 11%
WEST COAST 30% 11%
NELSON 30% 11%
MARLBOROUGH 30% 11%
CANTERBURY 30% 11%
SOUTHLAND 30% 11%
OTAGO 30% 11%

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JAPAN
VISITOR ACTIVITIES

Top activities for Japanese holiday visitors.

VISITOR ACCOMMODATION AND TRANSPORT

Hotels are the main form of accommodation used. Self drive is a less popular option than for other key markets.

ACCOMMODATION STAYED IN

- HOTEL 72%
- MOTEL / MOTOR INN / SERVICED APPT 22%
- BACKPACKER / HOSTELS 15%
- LUXURY 10%
- FAMILY AND FRIENDS 9%
- CAMPING 3%

TRANSPORT USED

- TOUR BUS 57%
- FERRY OR BOAT SERVICE 23%
- PLANE 44%
- RENTAL CAR 22%
- TAXI SHUTTLE 39%
- TRAIN 9%
- BUS SERVICE 35%
Japanese visitors are largely satisfied with their New Zealand experience. There is an opportunity to exceed more expectations and create more promoters to recommend New Zealand to others.

**Satisfaction**

8.8/10

Japanese visitors are highly satisfied with their New Zealand experience.

**Meeting Expectations**

91%

Expectations of New Zealand experience met or exceeded

- 46% Exceeded
- 45% Met
- 8% Worse than
- 1% Not sure

**Net Promoter Score**

58%

Likely to recommend New Zealand as a destination

61%

Promoters

36%

Passives

3%

Detractors

**Japan Active Considerers**

Active Considerers are what we call our target audience. These people are aged 18-74, they are aware of New Zealand, and it is a preferred destination to visit for a holiday in the next three years. They also indicate that they are prepared to spend ¥100,000 per person on their holiday.
Japanese Active Considerers = 6.5m

Active Considerers from Japan want to come to New Zealand to get in touch with nature and relax. To help our visitors achieve this, we need to communicate the recommended things to see and do, as well as how easy it is to travel around.
For Japanese Active Considerers, New Zealand is in the competitive set including destinations such as Australia, USA, Canada, Hawaii and Italy. Our strengths are our landscapes and scenery, and clean and unpolluted environment.

**WHAT JAPANESE KNOW US FOR**

- Clean & unpolluted
- Landscapes & scenery
- Affordable activities
- Unique experiences

**MESSAGES WE NEED TO COMMUNICATE MORE**

- Seeing lots without travelling far
- Easy to travel around
- Friendly people
- Range of adventure
Independent Professionals are people aged 25-54 years old. They are our largest segment within our Active Considerer target audience, making up 63% of our target audience.

**Gender Skews Male**

56% Male
44% Female

**Independent Professionals Are More Likely to Be Tertiary Qualified**

55%

**Independent Professionals Are More Likely to Have Higher Household Income**

<table>
<thead>
<tr>
<th>Income Range</th>
<th>AC</th>
<th>NON-AC</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt; ¥15 Million</td>
<td>6%</td>
<td>1%</td>
</tr>
<tr>
<td>¥8 - ¥15 Million</td>
<td>34%</td>
<td>21%</td>
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**What Do Independent Professionals Want from a Holiday in New Zealand?**

- 56% To Get in Touch with Nature
- 47% To Feel Relaxed
- 43% To Have Fun & Enjoy Myself
- 36% To Feel Refreshed
- 35% To Broaden My Mind

**What Does Their Holiday Look Like?**

- 29% Self Drive Exploring
- 41% Staying for 4-6 Days
- 34% Exploring from a Base
- 27% Staying for 4 Weeks
- 46% Travelling Alone

**What Do They Need More Information About?**

- 29% How Easy It is to Travel Around
- 25% How Safe It is from Crime
- 41% What and Where Are the Recommended Things to See and Do
- 28% What the Transportation Options Are for Travelling Within New Zealand

**Gender SKEWS MALE**

56%

**INDEPENDENT PROFESSIONALS ARE MORE LIKELY TO BE TERTIARY QUALIFIED**

55%
Active Boomers are people aged 55-74 years old. They are the second largest segment of our Active Considerer target audience, making up 31% of our target audience.

**Gender in line with total population split**

- 54% Male
- 46% Female

**Active Boomers are more likely to be tertiary qualified**

- 49%
- 41%

**University educated**

**Active Boomers are more likely to have higher household income**

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**What do Active Boomers want from a holiday in New Zealand?**

- 79% To get in touch with nature
- 56% To feel relaxed
- 44% To broaden my mind
- 42% To interact with people of a different culture or lifestyle
- 38% To feel safe

**What does their holiday look like?**

- 79%
- 41%

**What do they need more information about?**

- How long it takes to travel between the main attractions: 35%
- What are the recommended things to see and do: 35%
- What are the transport options for travelling within New Zealand: 38%
- How safe is it from crime: 32%
- How easy it is to travel around: 50%

**Self drive exploring**

Renting, borrowing or purchasing a vehicle to travel NZ in. They have high mobility across regions so typically do more activities.