JAPAN

These packs provide a brief snapshot of our core visitor markets prior to the interruption of international travel due to Covid-19.

Hot Water Beach, Coromandel
Japan was New Zealand’s 5th largest market by arrivals, comprising 2.6% of total arrivals. Japanese visitors spent $277M in the past year.

Source: Stats NZ international visitor arrivals Feb 2020
MBIE International Visitor Survey December 2019
A large number of <18s travel to NZ for high school trips, causing a spike in arrivals. Excluding these students, 25-34 represents the largest proportion of arrivals.
Japanese holiday arrivals are slightly skewed towards a summer holiday

7 out of 10 holiday visitors stay in New Zealand for a week or less

The vast majority of Japanese visitors travel directly to New Zealand

41% OF JAPANESE VISITORS RENT A CAR
35% TRAVEL BY TOUR BUS

TOP TRAVEL ROUTES

ROUTE % OF ARRIVALS
TOKYO > AUCKLAND 59%
OSAKA > AUCKLAND 11%
SYDNEY > AUCKLAND 4%
SYDNEY > QUEENSTOWN 3%
HONG KONG > AUCKLAND 2%
BRISBANE > AUCKLAND 2%

LENGTH OF STAY (DAYS)

1-3 DAYS 11%
4-7 DAYS 59%
8-14 DAYS 20%
15-21 DAYS 4%
22+ DAYS 6%

WILDLIFE ACTIVITIES
WATER ACTIVITIES
MUSEUMS, GALLERIES AND LIVE PERFORMANCES
MĀORI CULTURAL EXPERIENCES

Source: Stats NZ international visitor arrivals Feb 2020
MBIE International Visitor Survey December 2019
Active Considerers (ACs) are what we call our target audience. These people are aged 18-74, and have New Zealand as a preferred holiday destination in the next three years. They also indicate that they are prepared to spend ¥100,000 per person on their holiday.

**TOTAL ACTIVE CONSIDERERS**

7.6M

*Approximate number of active considerers in Japan (Dec 2019)*

**AGE SEGMENT OF ACTIVE CONSIDERERS**

<table>
<thead>
<tr>
<th>Age Segment</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>18-24</td>
<td>4%</td>
</tr>
<tr>
<td>25-54</td>
<td>63%</td>
</tr>
<tr>
<td>55-74</td>
<td>32%</td>
</tr>
</tbody>
</table>

61% of ACs in Japan are male

**ANNUAL HOUSEHOLD INCOME OF ACs**

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt; ¥4M</td>
<td>15%</td>
</tr>
<tr>
<td>¥4-6.99M</td>
<td>32%</td>
</tr>
<tr>
<td>¥7-9.99M</td>
<td>27%</td>
</tr>
<tr>
<td>&gt; ¥10M</td>
<td>26%</td>
</tr>
</tbody>
</table>

**TERTIARY EDUCATION OF ACs (BACHELOR'S DEGREE OR HIGHER)**

77%

**REGIONAL SPREAD OF ACs**

<table>
<thead>
<tr>
<th>Region</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tokyo</td>
<td>19%</td>
</tr>
<tr>
<td>Chiba</td>
<td>6%</td>
</tr>
<tr>
<td>Saitama</td>
<td>7%</td>
</tr>
<tr>
<td>Kanagawa</td>
<td>9%</td>
</tr>
<tr>
<td>Osaka</td>
<td>9%</td>
</tr>
</tbody>
</table>

Active considerer data is from the 6 month period ending April 2020
Appeal of NZ as a holiday destination has been slowly increasing over the last 12 months. Preference followed this trend though has seen a lift in April 2020. The prevalence of Active Considerers among the Japanese audience has been steady over the last 12 months.

Active considerer data is from the 12 month period ending April 2020
WHAT DO ACTIVE CONSIDERERS WANT FROM A HOLIDAY IN NEW ZEALAND?

- 60% to get in touch with nature
- 48% to feel refreshed
- 46% to feel relaxed
- 40% to take a break from the routine of everyday life
- 39% to have fun and enjoy myself
- 37% to indulge and pamper myself

*the 55-74 age group are the most interested in getting in touch with nature (73%)

WHAT DO THEY NEED MORE INFORMATION ABOUT?

- Driving on the left hand side of the road: 22%
- What is the length of time required to fly to New Zealand: 22%
- What is the length of time needed to experience New Zealand properly: 18%
- Does it get too hot in summer: 18%
- How long does it take to travel between the main attractions: 18%

*55-74 age group are more concerned than the younger ACs about driving on the left hand side of the road (29%)

WHO ARE THEY MOST INTERESTED IN TAKING TRIPS WITH?

- Most often, 25-54 year old ACs are interested in trips with their partner or children
- Most often, 55-74 year old ACs are interested in trips with their partner or friends

Active considerer data is from the 6 month period ending April 2020
APPEAL OF NEW ZEALAND AS A HOLIDAY DESTINATION HAS BEEN SLOWLY INCREASING OVER THE LAST 12 MONTHS, WHILE THE INCIDENCE OF ACS HAS BEEN STEADY AT JUST UNDER 10%.

40% of Japanese ACS have an improved perception of New Zealand.

27% of Japanese ACS expect to travel overseas less often after COVID-19.

SPEED OF NEW ZEALAND HOLIDAY DEMAND RECOVERY AFTER RESTRICTIONS ARE LIFTED

- Within 1 month: 4%
- Within 3 months: 9%
- Within 6 months: 21%
- Within 12 months: 27%
- Much later: 39%