

JAPAN

Visitors & Market Insights

July 2024



Milford Sound
Fiordland



NEW ZEALAND
TOURISM

**100% PURE
NEW ZEALAND**

TOURISM NEW ZEALAND'S MARKET APPROACH

Our Purpose

Enrich Aotearoa New Zealand and all who visit.

- Tourism must enrich New Zealand and the wellbeing of New Zealanders – contributing more than what it takes.
- Tourism must create jobs, restore nature, enhance our heritage, build our national reputation and make us proud.

Our Role

To promote New Zealand as a visitor destination to key markets around the world. Tourism New Zealand's new four-year strategy focuses on building desire for New Zealand as a year-round destination and converting that desire into off-peak arrivals. Off-peak seasons refer to the seasons between March-November in New Zealand – autumn, winter and spring.

Market Approach

Tourism New Zealand focuses on shaping the visitor mix through activity across a diverse portfolio of markets.

Our markets are determined by factors including there being an existing or potential group of people actively considering New Zealand as a destination.

Active Considerers

Among those considering overseas travel, Tourism New Zealand is focused on attracting Active Considerers, our target marketing audience. These people are aged 18-74, find New Zealand highly appealing, have New Zealand as a preferred holiday destination in the next three years, and have the means to do so.

About our Visitor Insights and Data

TNZ leverage a range of insight sources to support our marketing activity, including TNZ's Active Considerer Monitor, Stats NZ's International Visitor Arrivals and MBIE's International Visitor Survey.

Mix of Markets

The mix of markets covered in our Market Snapshots include:

- Australia
- China
- United States
- Germany
- Japan
- United Kingdom
- India



TRAVELLER INSIGHTS

Latest Japan market arrival insights

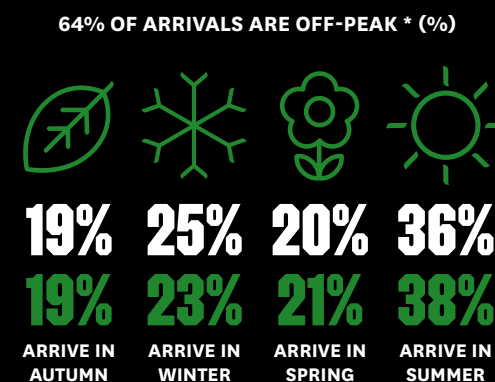
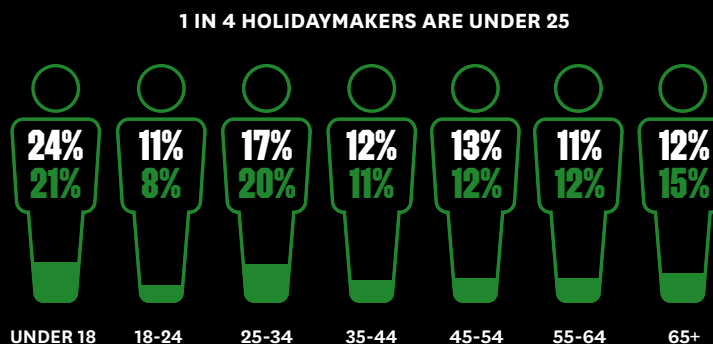
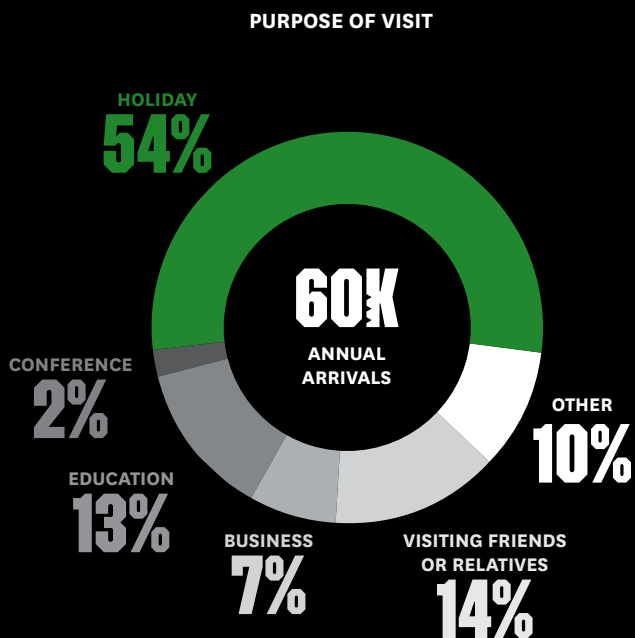


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TRAVELLER INSIGHTS



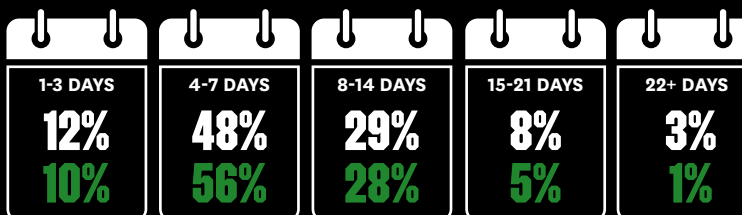
Last year, 60,200 Japanese travellers (1.7% of all arrivals) visited New Zealand, with 32,600 (54%) of them being holiday visitors.



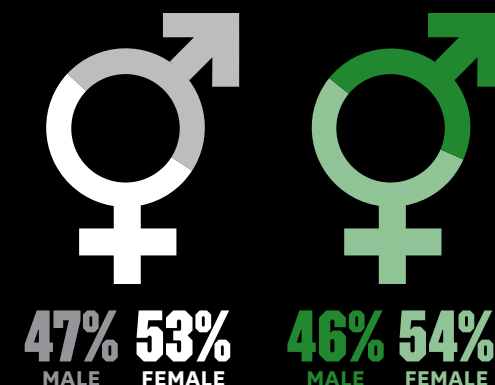
AVERAGE LENGTH OF STAY



OVER HALF OF HOLIDAY VISITORS SPEND 4-7 DAYS IN THE COUNTRY



GENDER OF VISITORS



ALL VISITORS HOLIDAY VISITORS

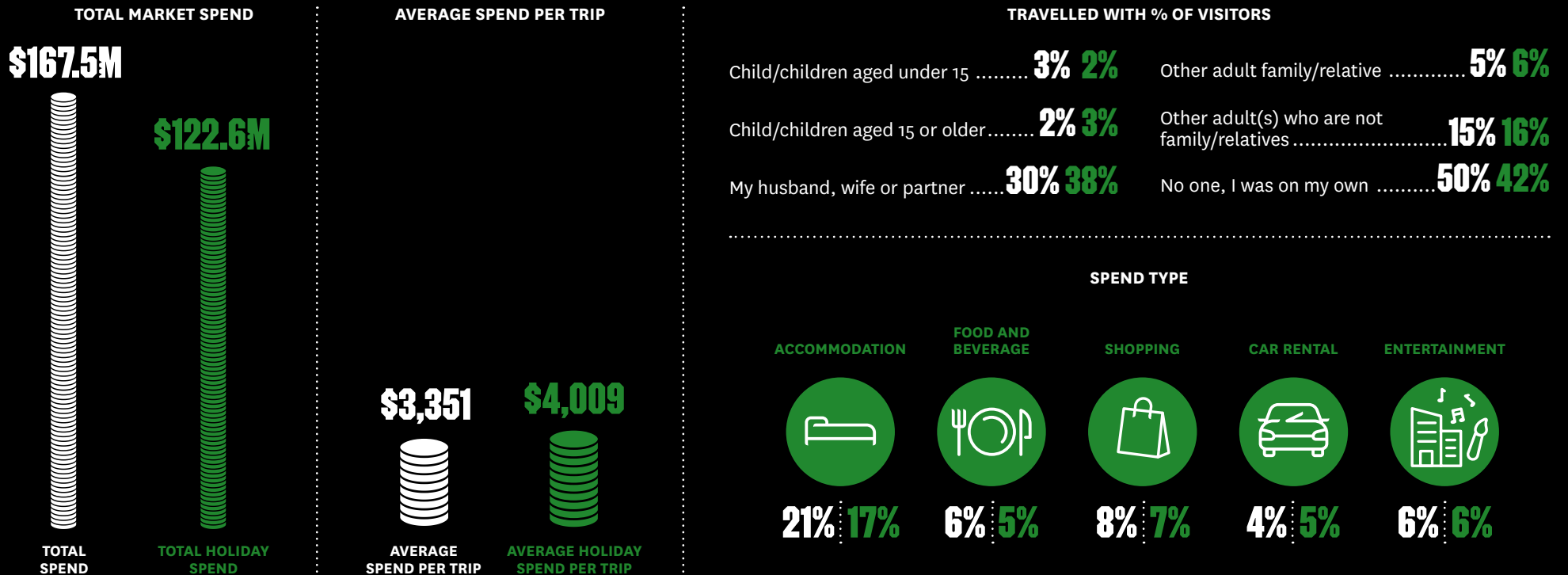
Source: Stats NZ international Visitor Arrivals – Year ending April 2024 –
 *Seasons: Autumn 23, Winter 23, Spring 23, Summer 23/24

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VISITOR SNAPSHOT



Japanese visitors spent \$167.5 million in New Zealand, with \$122.6M by holidaymakers. The average spend per trip was \$3,351, rising to \$4,009 for holiday visitors. One-fifth of spending was on accommodation, and nearly half of holiday visitors travelled alone.



ALL VISITORS HOLIDAY VISITORS

Source: MBIE, International Visitor Survey | Year ending March 2024

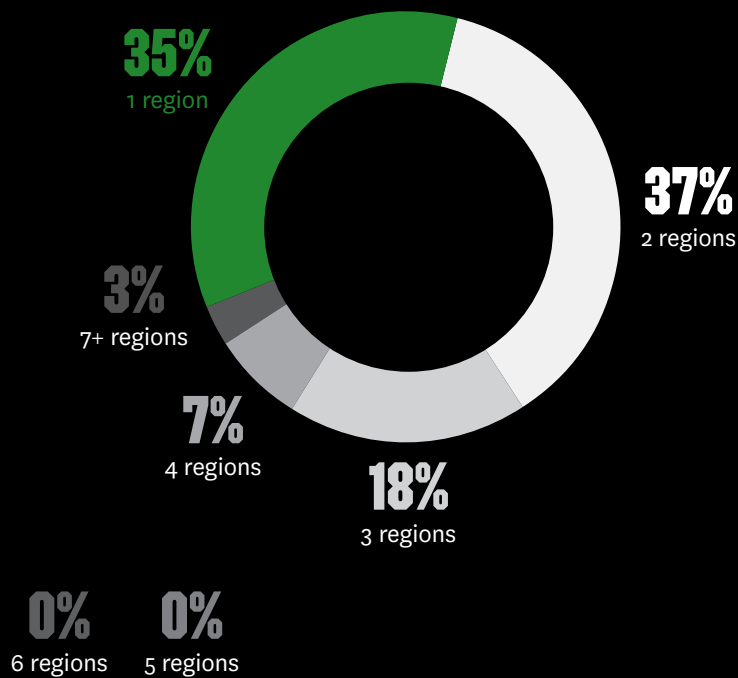
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TRAVELLER INSIGHTS

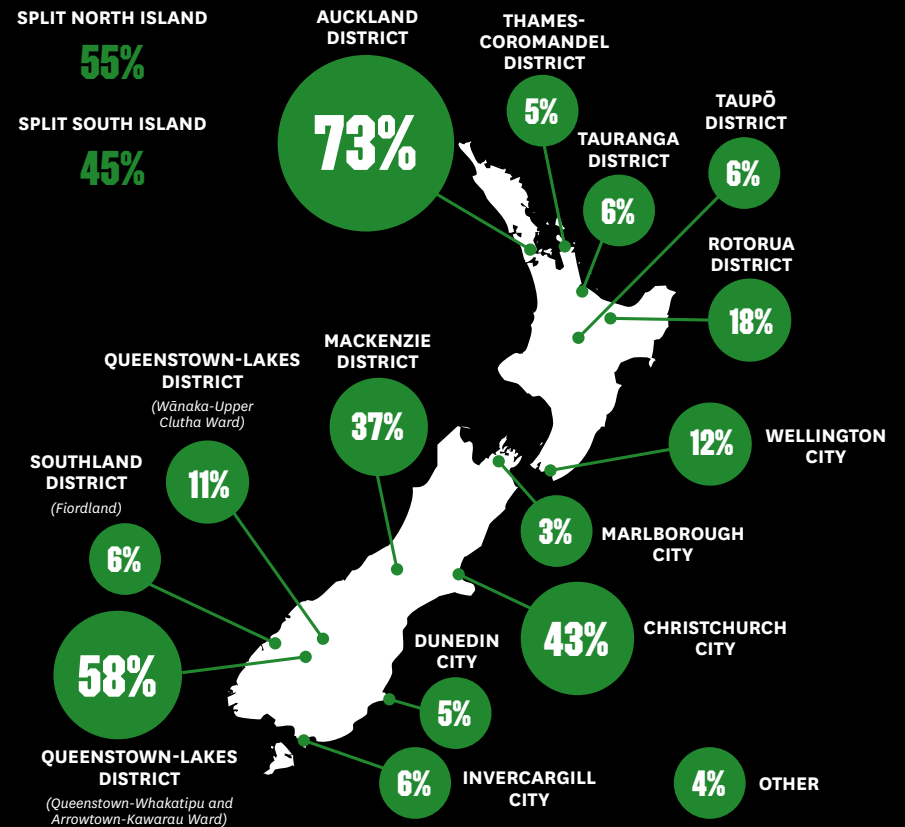


Japanese holiday visitors spent a fairly even amount of time in the North Island (55% of nights), and the South Island (45% of nights). Among them, 10% visited four or more regions, with Auckland being the most popular destination.

NUMBER OF REGIONS VISITED PER VISIT



REGIONS VISITED PER VISIT



Source: MBIE, International Visitor Survey | Year ending March 2024

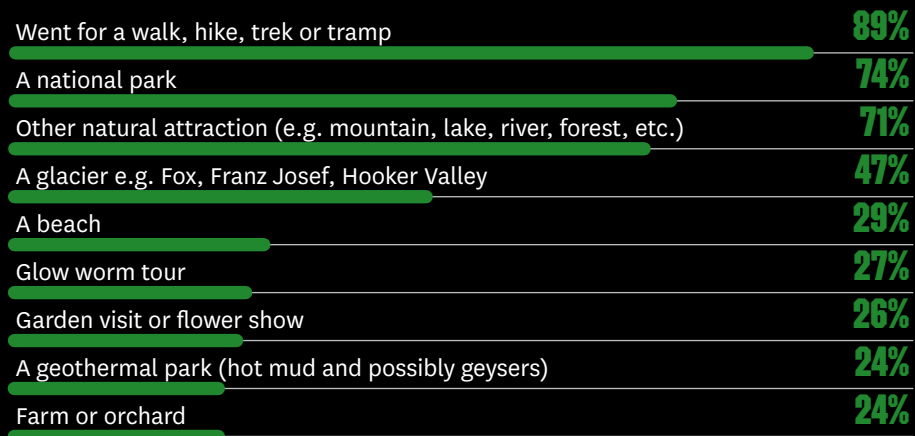
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TRAVELLER INSIGHTS

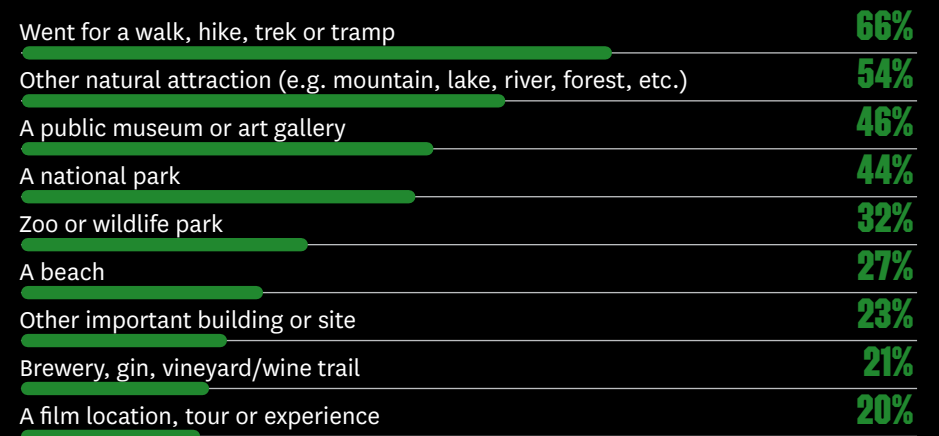


Most visitors favoured natural attractions like mountains and lakes, hiking, and national parks. Nearly half of visitors visited a public museum or gallery during the off-peak season.

TOP ACTIVITIES ENJOYED BY JAPANESE IN NEW ZEALAND - SUMMER



TOP ACTIVITIES ENJOYED BY JAPANESE IN NEW ZEALAND - OFF-PEAK (MAR - NOV)



89%

Walk, hike, trek or tramp



74%

A national park



71%

Other natural attractions



66%

Walk, hike, trek or tramp



54%

Other natural attractions



46%

A public museum or art gallery

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TRAVELLER INSIGHTS



Most visitors opted for hotels or booking through online websites. Domestic flights and taxis/shuttles were popular transport options among holidaymakers.

POPULAR ACCOMMODATION TYPES



69%

Hotel



16%

House/Apartment booked online (AirBnb etc)



11%

Motel, Motor Inn or Serviced Apartment



9%

Backpackers



5%

Youth Hostel, YMCA, YWCA



5%

With family or friends



4%

Camping at a National Park/ Department of Conservation camping ground



4%

House/flat that you paid some rent for



4%

Luxury Accommodation

MODES OF TRANSPORT



46%

Plane (within New Zealand)



35%

Taxi/shuttle



33%

Local bus service



32%

Tour bus



21%

Rental car



15%

Bus service between towns/cities



14%

Uber or other app based



14%

Other ferry



11%

Car or van owned by you/ family/friend(s)/company

OUR AUDIENCES

Our Active Considerers

Among those considering overseas travel, Tourism New Zealand is focused on attracting Active Considerers, our target marketing audience. These international holiday travellers are aged 18-74, find New Zealand highly appealing, have New Zealand as a preferred holiday destination to visit in the next three years, and they have the means to do so.

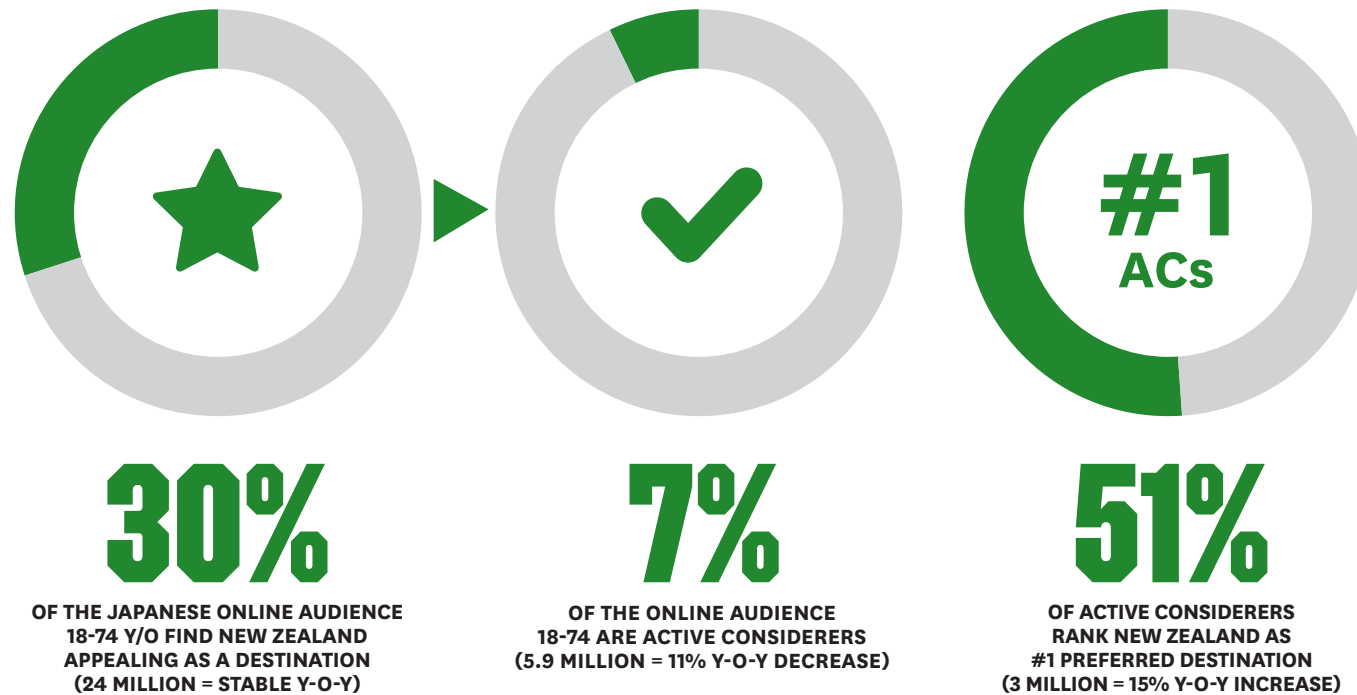


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ACTIVE CONSIDERERS

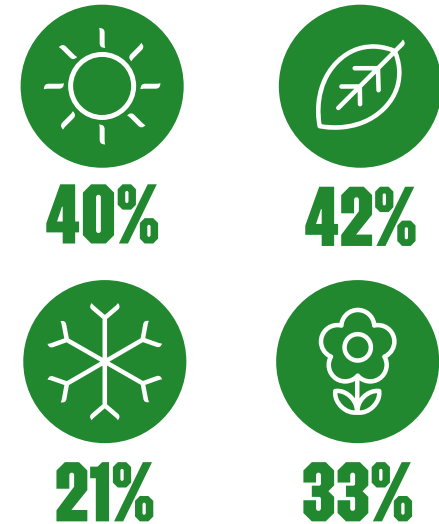


There are around 5.9 million Active Considerers in Japan, with 51% identifying New Zealand as their top destination choice.



SEASONAL CONSIDERATION

When would Active Considerers visit New Zealand (Non-exclusive)



TOTAL OFF-PEAK CONSIDERATION*



Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years, and have the means to do so.
 Source: Active Considerer Monitor data 6-month period ending May 2024

*Percentage of active considerers who would consider visiting between March and November

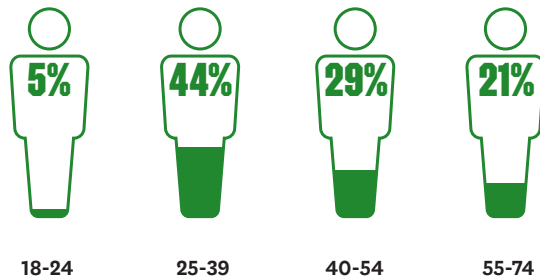


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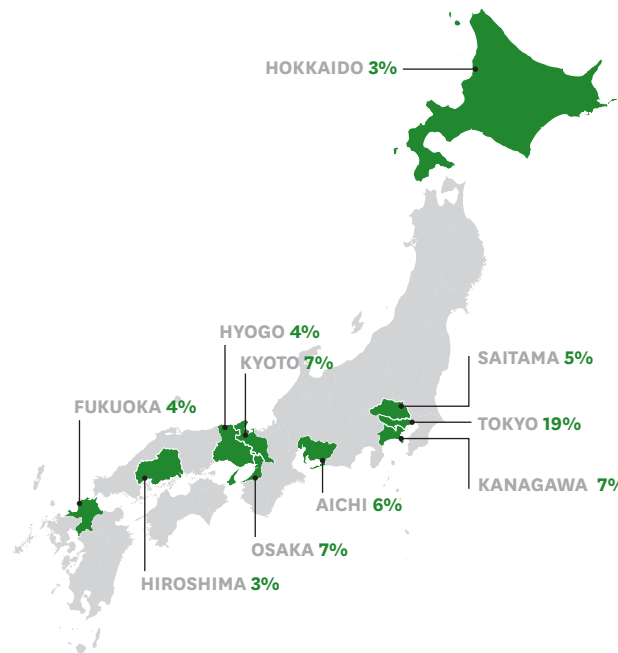
ACTIVE CONSIDERERS

Active Considerers skew 25-39, almost 20% reside in Tokyo, and nearly 30% have a household income of over ¥10 million.

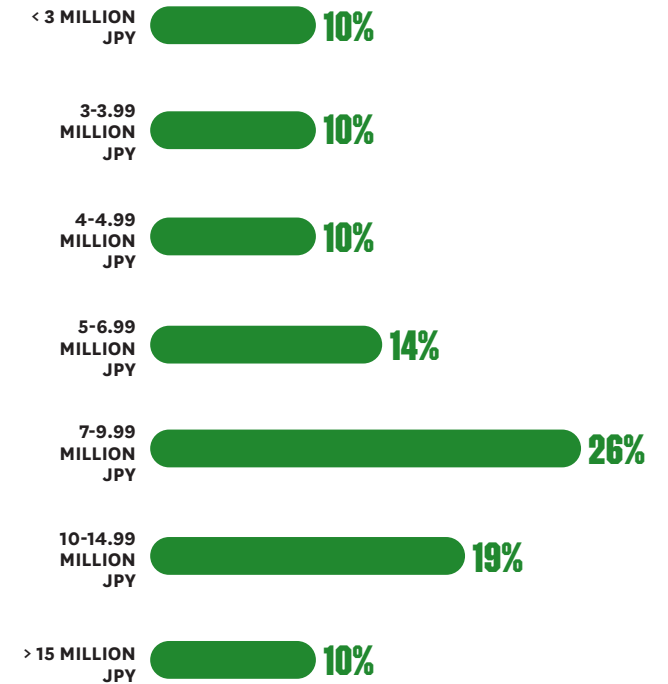
OVER 40% ACS ARE BETWEEN 25-39



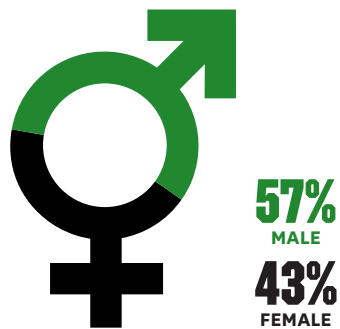
ACTIVE CONSIDERERS LIVE MAINLY IN TOKYO



ANNUAL HOUSEHOLD INCOME SPREAD - ACS



GENDER OF ACS



Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years, and have the means to do so.

Source: Active Considerer Monitor data 6-month period ending May 2024

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ACTIVE CONSIDERERS



Among Japanese Active Considerers, New Zealand is most associated with stunning landscapes, amazing wildlife experiences, a pristine environment and a wide variety of outdoor and adventure offerings.

BRAND ASSOCIATIONS



SPECTACULAR NATURAL LANDSCAPES AND SCENERY

78%



HAS AMAZING WILDLIFE EXPERIENCES

77%



THE ENVIRONMENT THERE IS CLEAN AND UNPOLLUTED

74%



OFFERS A WIDE VARIETY OF OUTDOOR & ADVENTURE ACTIVITIES

73%



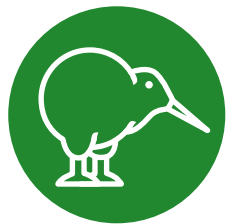
IDEAL TO RELAX AND REFRESH

73%



HAS A UNIQUE INDIGENOUS CULTURE

72%



OFFERS EXPERIENCES THAT YOU CANNOT GET ANYWHERE ELSE

68%



OFFERS OPPORTUNITIES TO EXPERIENCE LOCAL CULTURE

68%



A PLACE YOU CAN ESCAPE FROM THE ORDINARY

68%

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Source: Active Considerer Monitor data 6-month period ending May 2024

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ACTIVE CONSIDERERS



Getting in touch with nature, New Zealand's beautiful landscapes, and relaxation are key reasons for Japanese Active Considerers to visit.

REASONS TO VISIT NEW ZEALAND



TO GET IN TOUCH WITH NATURE

54%



TO EXPERIENCE BEAUTIFUL LANDSCAPES/SCENERY

52%



TO FEEL RELAXED AND REFRESHED

49%



TO INDULGE & PAMPER MYSELF

37%



TO HAVE FUN & ENJOY MYSELF

33%



TO INTERACT WITH PEOPLE OF A DIFFERENT CULTURE OR LIFESTYLE

29%



TO TAKE A BREAK FROM THE ROUTINE, STRESSES AND PRESSURES OF EVERYDAY LIFE

23%



TO FEEL A SENSE OF ADVENTURE

23%



TO LEARN & EXPLORE NEW THINGS

19%

Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years, and have the means to do so.

Source: Active Considerer Monitor data 6-month period ending May 2024

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ACTIVE CONSIDERERS



Active Considerers highly value the opportunity to visit marine reserves, explore national parks and nature reserves and taste local cuisine.

ACTIVITIES SPARKING INTEREST AMONG THOSE INTENDING TO VISIT



MARINE RESERVES (PROTECTED CONVERSATION AREAS)

88%



VISITING NATIONAL PARKS, NATURE RESERVES OR NATIVE FORESTS

87%



TRYING LOCAL CUISINE

87%



SCENIC TRAIN TRIP

86%



EXPLORING MAIN CITIES

86%



SCENIC BOAT CRUISE

86%



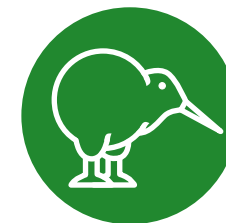
BEACHES & COASTS

85%



HISTORICAL SITES AND HERITAGE SITES

85%



WILDLIFE EXPERIENCES

85%

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ACTIVE CONSIDERERS

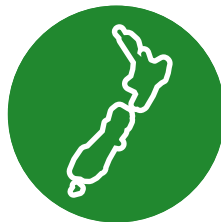


Key concerns and knowledge gaps for potential visitors include weather conditions, flight time to New Zealand, how welcoming locals are, and ease of travelling while in New Zealand.

KNOWLEDGE GAPS FOR CHOOSING NEW ZEALAND AS A HOLIDAY



WHAT THE WEATHER IS LIKE
37%



THE LENGTH OF TIME REQUIRED TO FLY TO NEW ZEALAND
31%



HOW WELCOMING THE LOCALS ARE
30%



HOW EASY IT IS TO TRAVEL AROUND
30%



THE QUALITY AND VARIETY OF FOOD AND BEVERAGE OPTIONS
27%



WHAT/WHERE THE RECOMMENDED THINGS TO SEE AND DO ARE
27%



HOW LONG IT TAKES TO TRAVEL BETWEEN THE MAIN ATTRACTIONS
27%



WHERE I SHOULD GET INFORMATION ABOUT ORGANISING A HOLIDAY
25%



HOW SAFE IS IT FROM CRIME
25%

Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years, and have the means to do so.

Source: Active Considerer Monitor data 6-month period ending May 2024

NGĀ MIHI