

JAPAN

Visitor & Market Insights

July 2026



**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 strategy is focused on driving year-round arrivals to support economic growth.

Market Approach

Tourism New Zealand (TNZ) 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

These are international holiday travellers, aged 18-74, who find New Zealand highly appealing. New Zealand is among their top 5 preferred destinations to visit, they have serious intentions to visit in the next 3 years, and they have a realistic budget for their trip.

About our Visitor Insights and Data

TNZ leverages 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.

Markets

The markets covered in our Snapshots include:

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



VISITOR INSIGHTS

International Visitor Arrivals

International arrivals sourced from Stats NZ; includes non-New Zealand or New Zealand residents living overseas who are arriving for a stay of less than 12 months

International Visitor Survey

International Visitor Survey (IVS) commissioned by the Ministry of Business, Innovation and Employment (MBIE); captures survey data from international visitors shortly after their trip to New Zealand

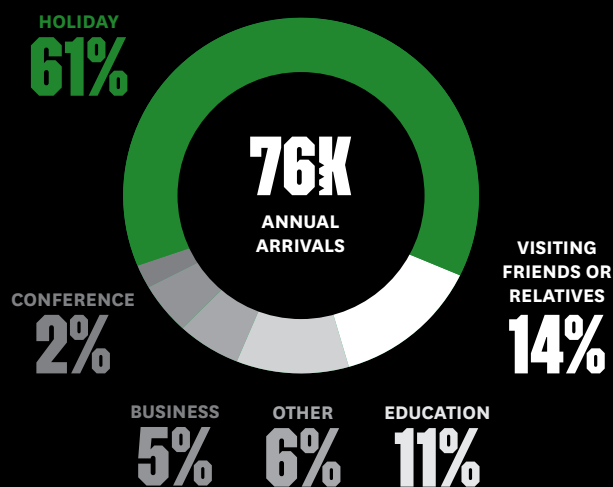
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VISITOR INSIGHTS | ARRIVALS

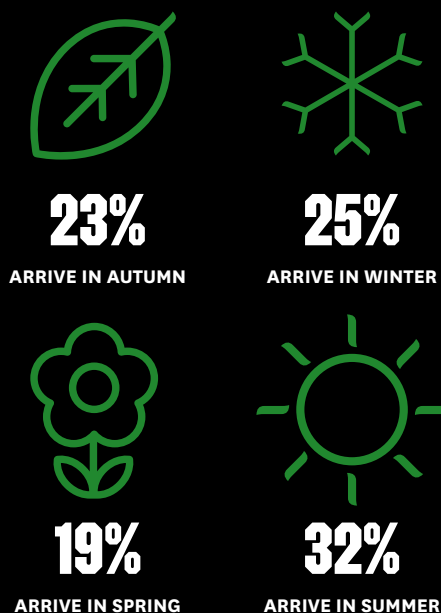


Japan delivered 76,000 arrivals last year, with holiday travellers accounting for more than three-fifths (61%) of all visitors. Visitation is distributed relatively evenly throughout the year, with both winter and summer attracting strong demand

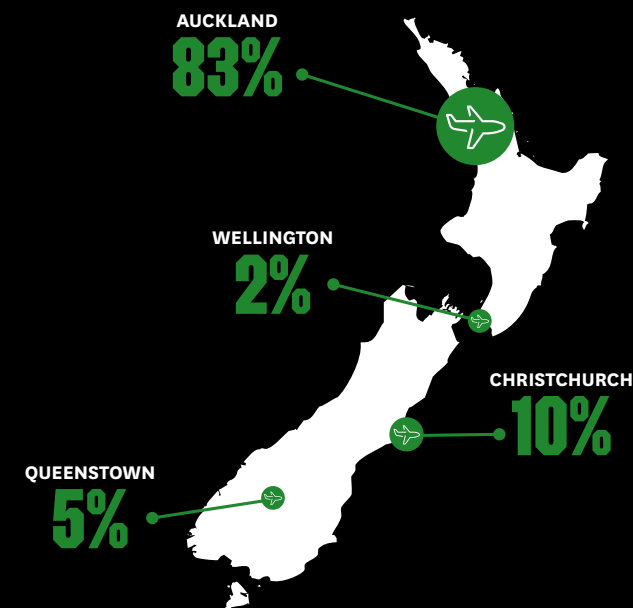
HOLIDAY TRAVEL IS THE PRIMARY DRIVER OF JAPANESE VISITATION



DEMAND REMAINS RELATIVELY BALANCED ACROSS SEASONS



AUCKLAND IS THE PRIMARY GATEWAY FOR JAPANESE VISITORS



Source: Stats NZ International Visitor Arrivals – all arrivals – year ending March 2026

Seasons: Autumn 25/26 (April and May 2025 and March 2026), Winter 25 (June–August 2025), Spring 25 (September–November 2025), and Summer 25/26 (December 2025–February 2026).

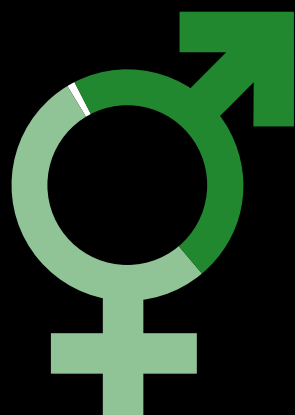
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VISITOR INSIGHTS | WHO THESE HOLIDAYMAKERS ARE



Japanese holiday visitors skew younger than many other markets, with 27% aged 15–24. Solo travel is common (44%), and most visitors stay between 4–7 days (51%), reflecting shorter, focused itineraries

BALANCED REPRESENTATION ACROSS GENDERS

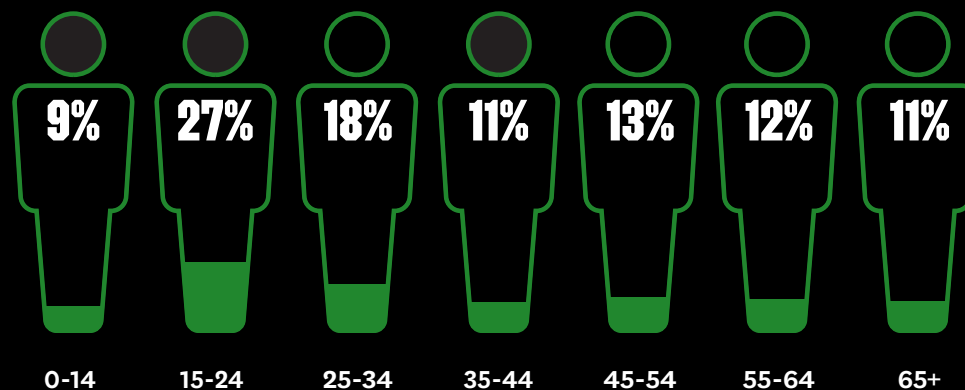


52%
FEMALE

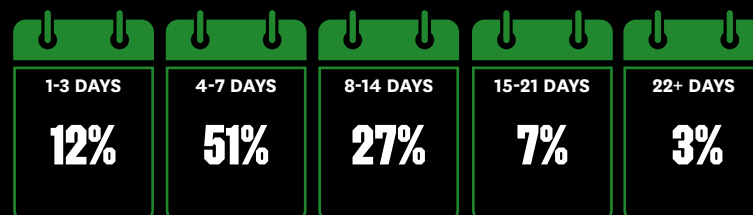
46%
MALE

1%
OTHER

45% ARE 15–34 YEARS OLD



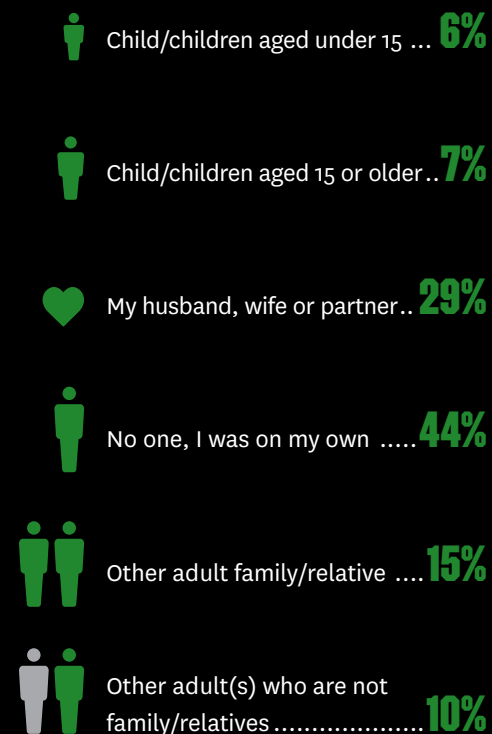
LENGTH OF STAY (DAYS)



AVERAGE LENGTH OF STAY



SOLO TRAVEL PLAYS A LARGE ROLE



Sources: Stats NZ International Holiday Arrivals | Year Ending March 2026

International Visitor Survey | Year ending March 2026 | Holiday Visitors (Travel Party)

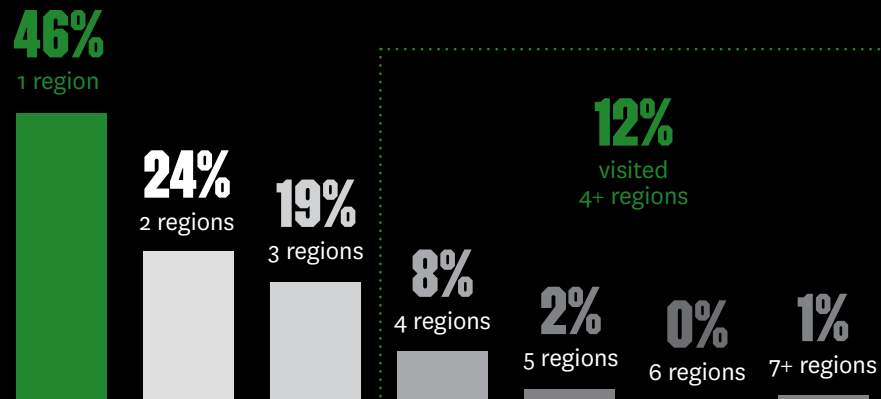
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VISITOR INSIGHTS | WHERE THEY GO



Japanese holidaymakers are more geographically concentrated than many long-haul markets. Nearly half visit only one region (46%), while just 12% explore four or more regions. Auckland, Mackenzie, Queenstown, and Christchurch form the core visitor circuit

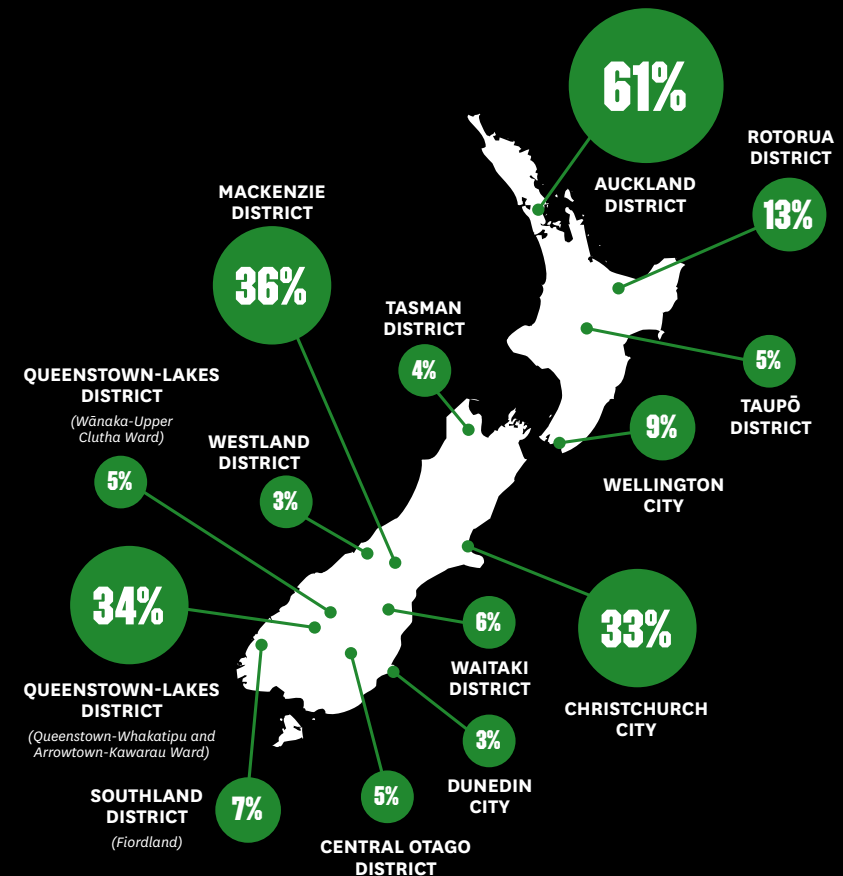
MOST HOLIDAYMAKERS EXPLORED ONE OR TWO REGIONS



SEVEN IN TEN HOLIDAY VISITORS EXPLORED THE NORTH ISLAND



TRAVEL IS FOCUSED ON ICONIC DESTINATIONS RATHER THAN EXTENSIVE REGIONAL EXPLORATION



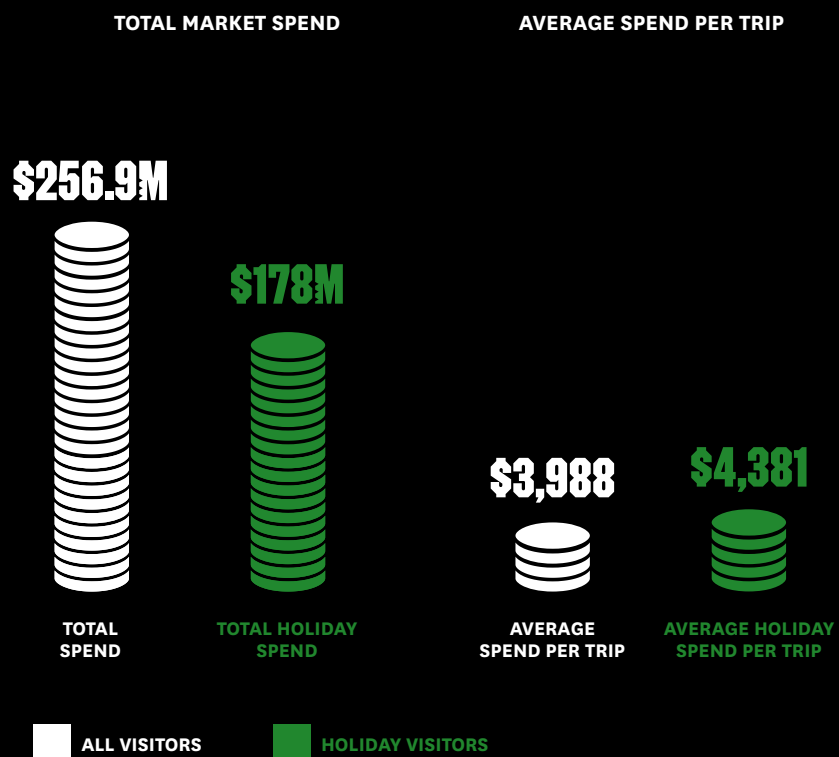
Source: MBIE, International Visitor Survey | Year ending March 2026 | Holiday Visitors

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VISITOR INSIGHTS | HOW MUCH THEY SPEND



Japanese visitors contributed over NZ\$250 million to New Zealand last year, including NZ\$178 million from holiday travel. Holidaymakers spent an average of NZ\$4,381 per trip, generating strong value despite shorter stays



ACCOMMODATION REPRESENTS THE LARGEST SHARE OF HOLIDAY EXPENDITURE

ACCOMMODATION



27%

FOOD AND BEVERAGE



7%

SHOPPING



8%

CAR RENTAL



9%

ENTERTAINMENT



8%

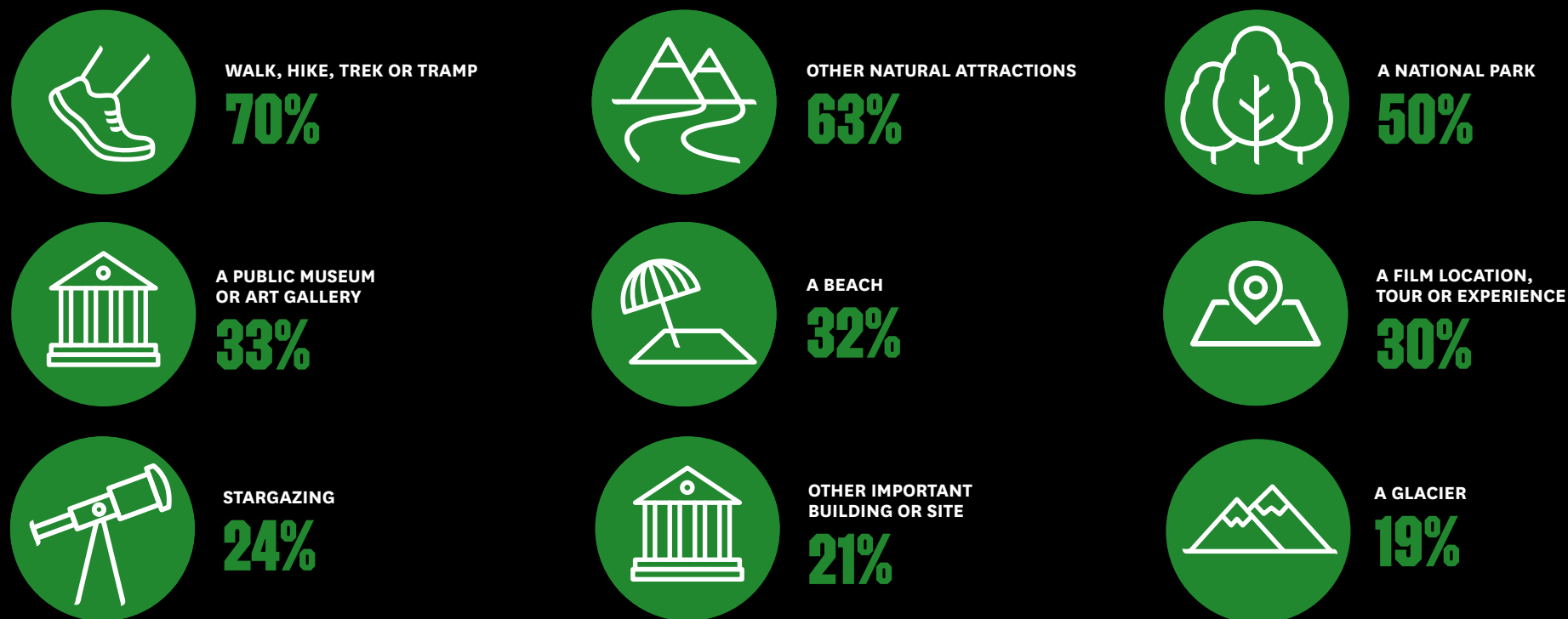
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VISITOR INSIGHTS | WHAT THEY DO



Nature and iconic attractions shape the Japanese visitor experience, with walking, hiking, national parks, and scenic attractions among the most popular experiences. Museums, film locations, stargazing, and glaciers further enrich the experience

TOP ACTIVITIES ENJOYED BY JAPANESE ON HOLIDAY IN NEW ZEALAND



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VISITOR INSIGHTS | WHERE THEY STAY



Hotels are the preferred accommodation option (62%), significantly ahead of online-booked rentals (25%). Other accommodation types play a relatively minor role compared with other visitor markets

POPULAR ACCOMMODATION TYPES



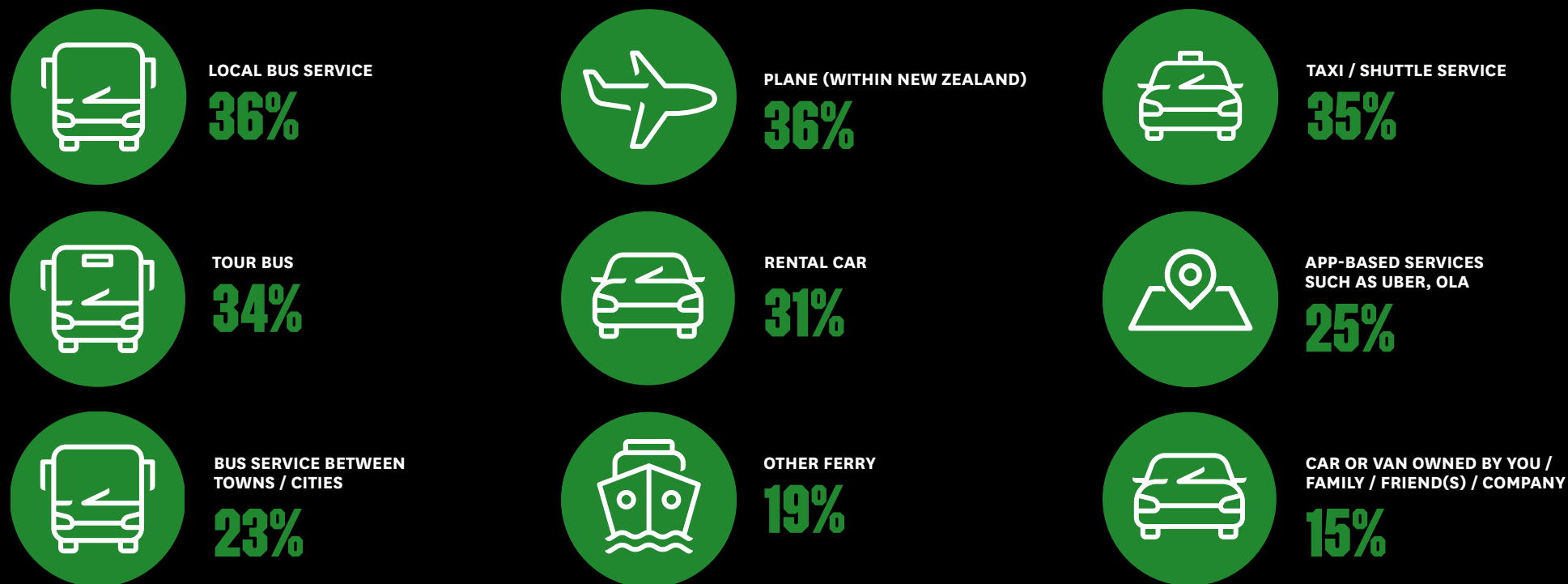
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VISITOR INSIGHTS | HOW THEY TRAVEL



Japanese holidaymakers rely on a diverse mix of transport options, including local buses, domestic flights, taxis, and tour buses. Rental car usage is lower than in many other long-haul markets, reflecting a preference for organised and public transport options

HOW THEY TRAVEL



OUR FUTURE TRAVELLERS

Active Considerers

Who qualifies as an Active Considerer?

Active Considerers are travellers who meet all four criteria:

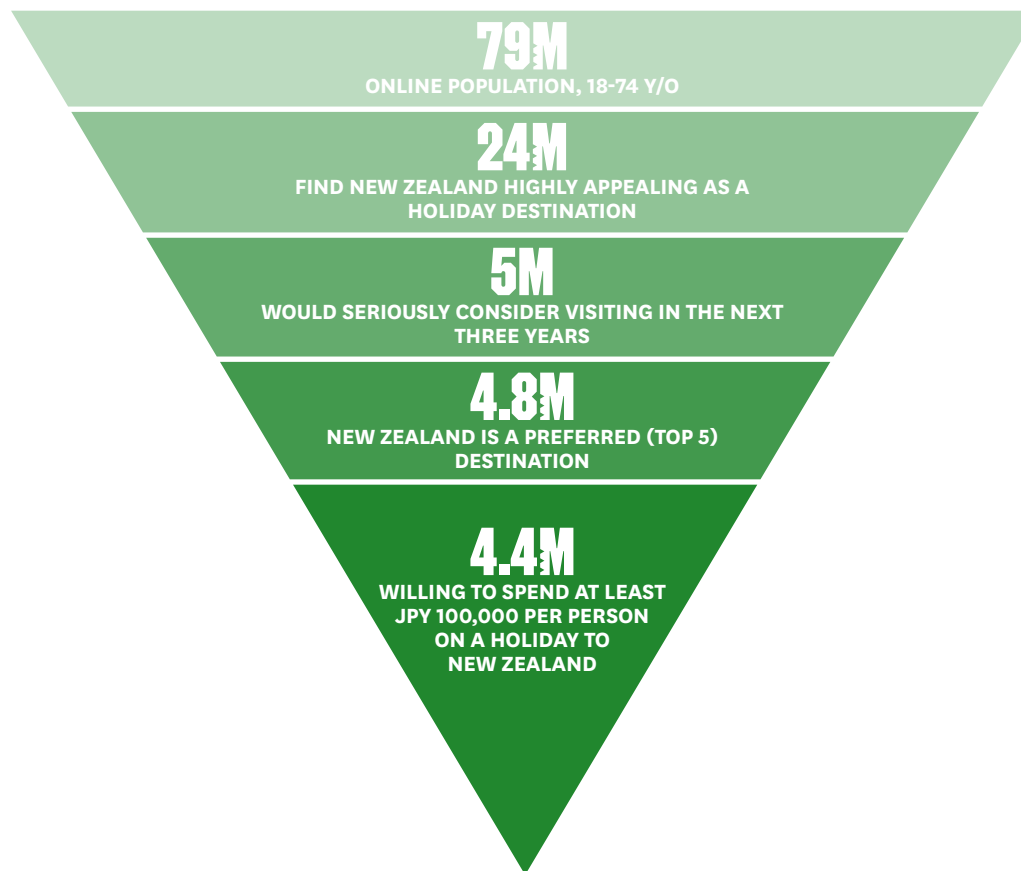
- **High appeal** – Find New Zealand highly appealing as a holiday destination
- **Strong intent** – Would seriously consider visiting in the next three years
- **Destination preference** – Agree that New Zealand is a preferred destination for their next holiday
- **Realistic budget** – Have a minimum spend level aligned to the market

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ACTIVE CONSIDERERS | JOURNEY FUNNEL



An estimated 4.4 million Japanese travellers qualify as Active Considerers, with 45% ranking New Zealand as their preferred destination. More than one-third are in a booking mindset, highlighting strong travel intent



67% OFF-PEAK CONSIDERATION*



44% (1.9M) TOP PREFERENCE** AMONG ACTIVE CONSIDERERS



34% (1.5M) BOOKING MINDSET***

*Off-Peak Consideration: Would consider travelling during autumn, winter, or spring, in addition to or instead of summer.

**Top Preference: Rank New Zealand as their #1 destination choice

***Booking Mindset: Ready to make firm bookings or have already booked their trip

Source: Active Considerer Monitor data six-month period ending May 2026

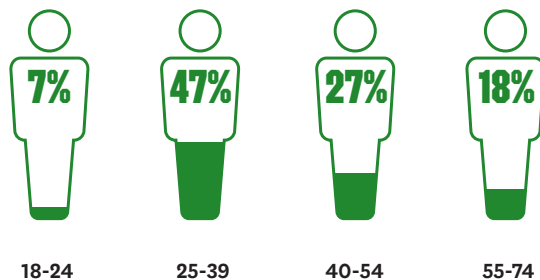
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ACTIVE CONSIDERERS | WHO THEY ARE & WHERE THEY LIVE



Active Considerers are predominantly aged 25-54 (74%) and concentrated in Tokyo and Osaka. The audience includes families with children, independent households, and younger adults living at home

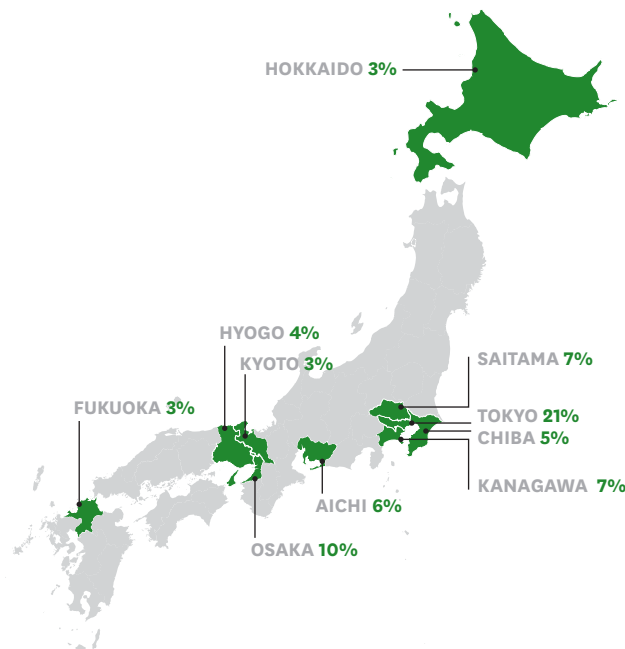
AGE SEGMENT OF ACTIVE CONSIDERERS



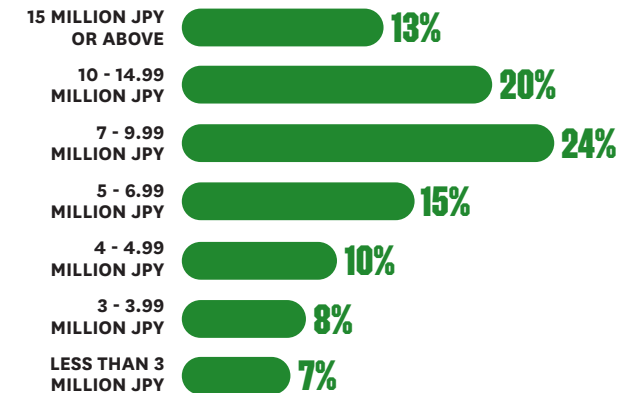
THREE IN FOUR ARE AGED

25-54

TOKYO AND OSAKA ARE KEY SOURCE REGIONS

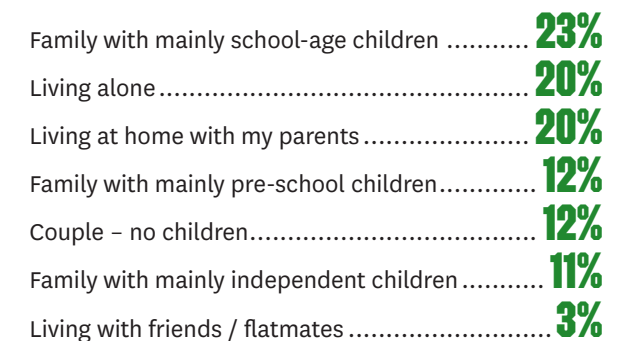


MIDDLE AND HIGHER-INCOME HOUSEHOLDS DOMINATE THE AUDIENCE



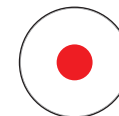
**Doesn't include those selecting 'prefer not to answer'*

FAMILIES AND COUPLES MAKE UP THE LARGEST HOUSEHOLD GROUPS



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ACTIVE CONSIDERERS | HOW THEY SEE NEW ZEALAND



Nature, wildlife, and unique experiences define New Zealand's appeal. It is also associated with clean environments, relaxation, cultural authenticity, safety, and an escape from everyday life



Source: Active Considerer Monitor data six-month period ending May 2026

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ACTIVE CONSIDERERS | REASONS TO VISIT NEW ZEALAND



Nature and relaxation are the strongest motivations to visit. Connecting with nature, indulgence, and enjoying local food and beverage experiences also play an important role



TO EXPERIENCE BEAUTIFUL
LANDSCAPES AND SCENERY

53%



TO GET IN TOUCH WITH NATURE

50%



TO FEEL RELAXED
AND REFRESHED

48%



TO INDULGE AND PAMPER MYSELF

40%



TO HAVE FUN AND ENJOY MYSELF

40%



TO ENJOY LOCAL FOOD
AND BEVERAGES

36%



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

32%



TO FEEL A SENSE OF ADVENTURE

29%



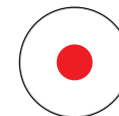
TO INTERACT WITH PEOPLE OF A
DIFFERENT CULTURE OR LIFESTYLE

28%

Source: Active Considerer Monitor data six-month period ending May 2026

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ACTIVE CONSIDERERS | WHAT THEY WOULD LIKE TO SEE & DO IN NEW ZEALAND



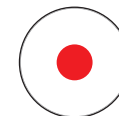
Japanese Active Considerers show strong interest in uniquely New Zealand experiences, including stargazing, heritage attractions, hot pools, scenic cruises, train journeys, local cuisine, marine reserves, and national parks



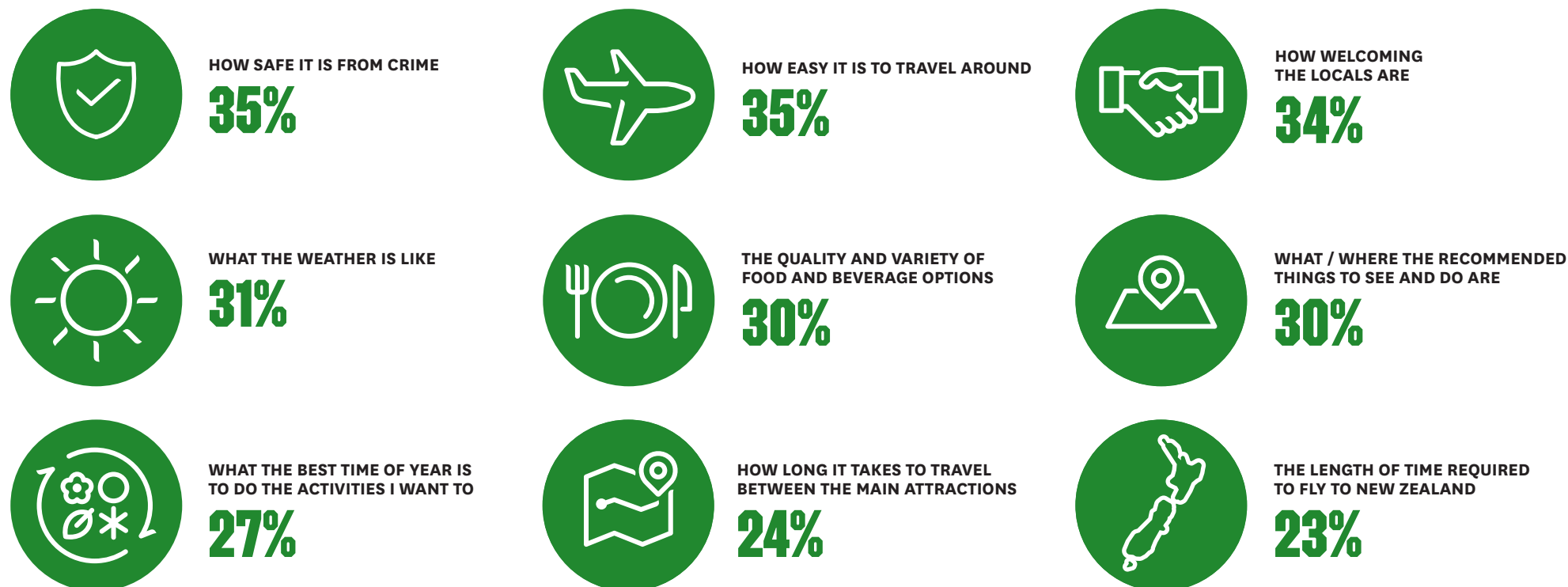
Source: Active Considerer Monitor data six-month period ending May 2026

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ACTIVE CONSIDERERS | WHAT THEY NEED TO KNOW BEFORE VISITING NEW ZEALAND



Japanese Active Considerers seek reassurance around safety, ease of travel, local hospitality, weather conditions, food options, and recommended experiences. Practical information plays an important role in trip planning



Source: Active Considerer Monitor data six-month period ending May 2026

NGA MIHI