

JAPAN

Visitors & Market Insights

July 2025



Hump Ridge Track
Fiordland



**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 people are aged 18-74, find New Zealand highly appealing, have New Zealand as a preferred holiday destination within the next three years and a realistic budget for their trip.

About our Visitor Insights and Data

TNZ leverage a range of insight sources to support our marketing activity, including TNZ's Active Considerer Monitor, Statistics New Zealand'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
- Singapore



VISITOR INSIGHTS

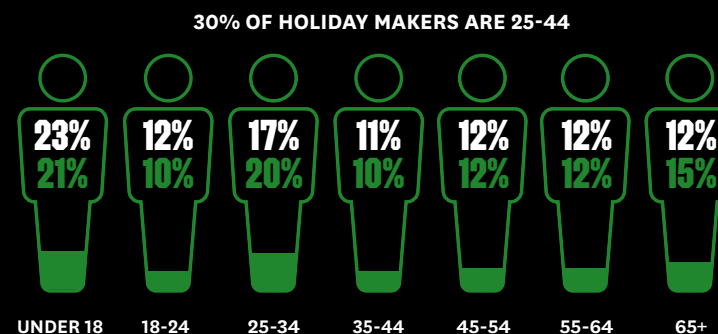
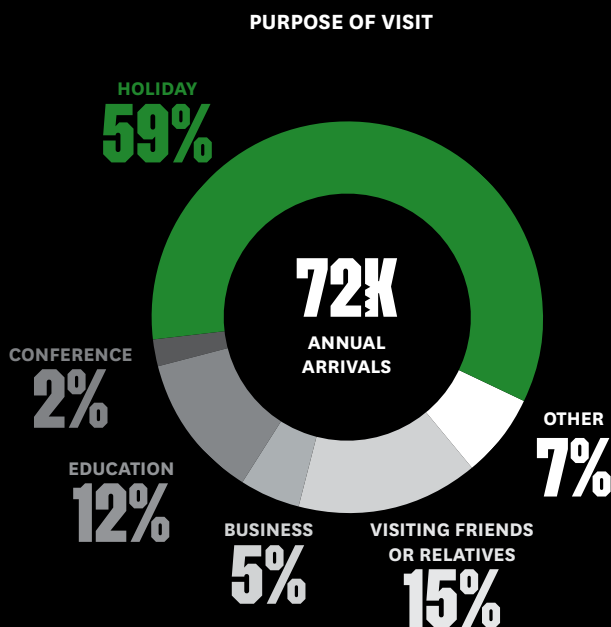
Latest Japan market arrival insights

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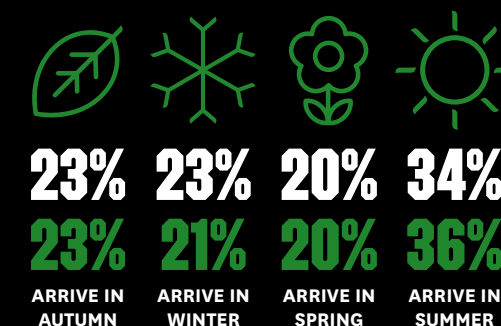
TRAVELLER INSIGHTS



Last year, 72,000 Japanese visited New Zealand, with 59% arriving for holidays. Summer was the peak season, and most holidaymakers stayed 4-7 days. Females made up 56% of holiday visitors, and 30% were aged 25-44. Education and family visits also contributed significantly to overall travel purpose.



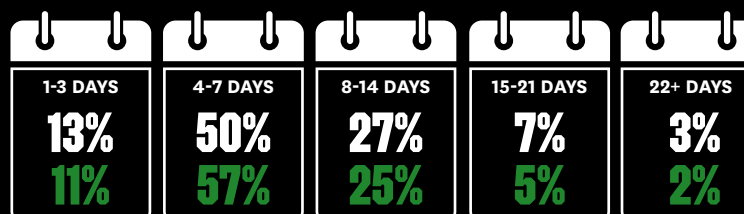
EVEN SEASONAL VISITATION PEAKS IN SUMMER



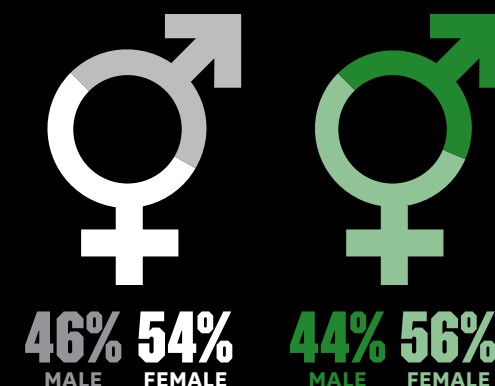
AVERAGE LENGTH OF STAY



HOLIDAY VISITORS SPEND AN AVERAGE OF 7 DAYS IN THE COUNTRY



GENDER OF VISITORS



ALL VISITORS HOLIDAY VISITORS

Source: Statistics NZ International Visitor Arrivals - Year ending May 2025

*Seasons: Winter 24, Spring 24, Summer 24/25, Autumn 25

Due to rounding, the sum of individual group percentages may not total exactly 100%

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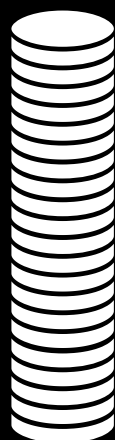
VISITOR SNAPSHOT



Japanese visitors spent \$207.5 million in NZ, with \$119.1 million by holidaymakers. The average spend per trip was \$3,455 for holidays. One quarter of spending was on accommodation, and visitors were more likely to travel with their significant other or on their own.

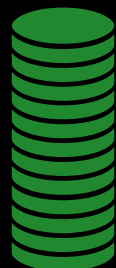
TOTAL MARKET SPEND

\$207.5M



TOTAL
SPEND

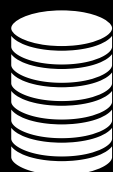
\$119.1M



TOTAL HOLIDAY
SPEND

AVERAGE SPEND PER TRIP

\$3,507



AVERAGE
SPEND PER TRIP

\$3,455



AVERAGE HOLIDAY
SPEND PER TRIP

TRAVELLED WITH % OF VISITORS

Child/children aged under 15	5% 6%	Other adult family/relative	10% 10%
Child/children aged 15 or older	4% 5%	Other adult(s) who are not family/relatives	20% 20%
My husband, wife or partner	25% 34%	No one, I was on my own	42% 35%

SPEND TYPE

ACCOMMODATION



27% 26%

FOOD AND BEVERAGE



13% 8%

SHOPPING



8% 8%

CAR RENTAL



5% 6%

ENTERTAINMENT



5% 6%

ALL VISITORS

HOLIDAY VISITORS

Source: MBIE, International Visitor Survey. Year ending March 2025

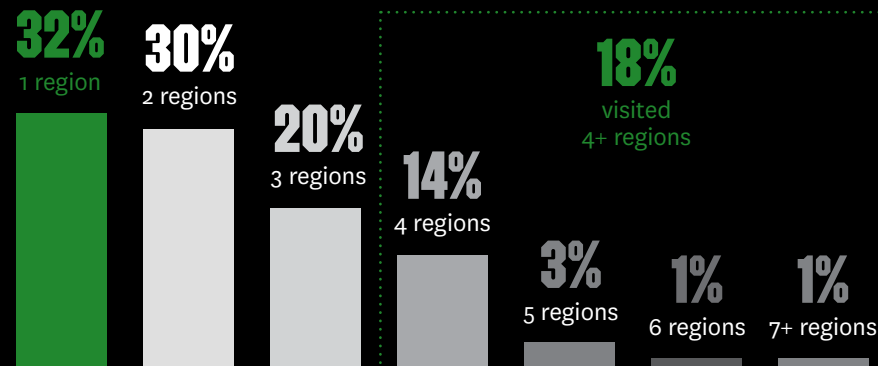
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TRAVELLER INSIGHTS

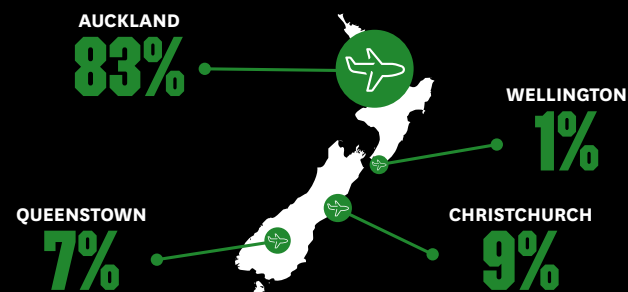


76% of Japanese holidaymakers visited the North Island, 61% visited the South Island, with 37% visiting both. Compared to other markets, they tend to focus on fewer destinations, with only 18% visiting four or more regions. The top four regions visited were Auckland, Mackenzie District, Christchurch, and Queenstown-Lakes District.

NUMBER OF REGIONS VISITED PER VISIT



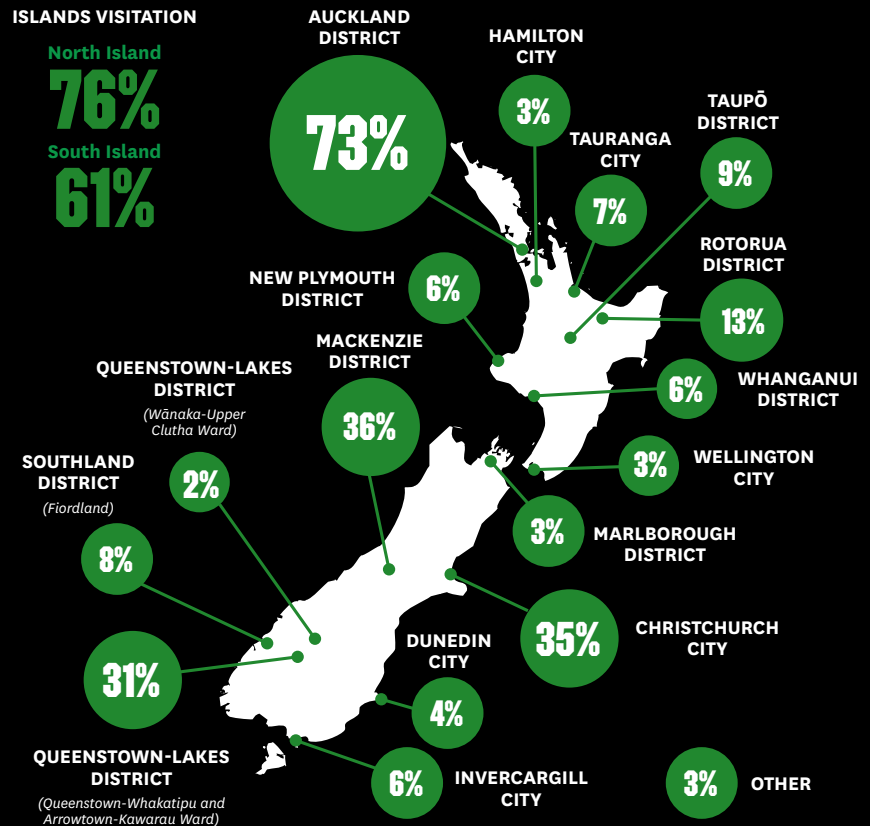
ARRIVAL AIRPORT



REGIONS VISITED PER VISIT

ISLANDS VISITATION

North Island
76%
South Island
61%



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TRAVELLER INSIGHTS



Japanese holidaying in New Zealand enjoyed walking, hiking and tramping and are drawn to its natural beauty, with mountains, lakes, hiking trails, and national parks topping the list. Many also enjoy beach visits, museums and galleries, along with wildlife experiences.

TOP ACTIVITIES ENJOYED BY JAPANESE IN NEW ZEALAND



Source: MBIE, International Visitor Survey | Year ending March 2025 | Holiday Visitors

JAPAN

TRAVELLER INSIGHTS



The majority of Japanese visitors chose to stay in hotels or online-booked private accommodations, followed by motels and serviced apartments. They tend to use a wide range of transport options, with domestic flights, rental cars, and local bus services being the most popular among holidaymakers.

POPULAR ACCOMMODATION TYPES



58%

Hotel



16%

House/Apartment booked online (AirBnb etc)



9%

With family or friends



8%

Motel, Motor Inn or Serviced Apartment



6%

Backpackers



6%

Youth Hostel, YMCA, YWCA



5%

Luxury Accommodation



4%

House/flat that you paid some rent for



2%

Other (paid) camping ground/holiday park

MODES OF TRANSPORT



29%

Plane (within New Zealand)



29%

Rental car



28%

Local bus service



26%

Taxi/shuttle



23%

Tour bus



23%

Other ferry



21%

Bus service between towns/cities



15%

Uber or other app based



14%

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

OUR FUTURE TRAVELLERS

Our Active Considerers

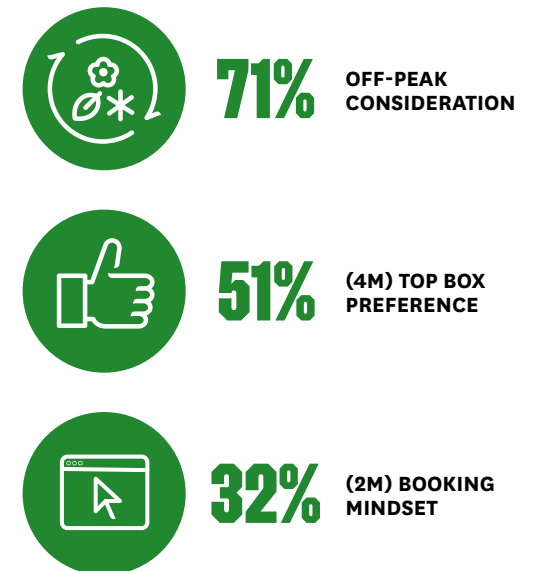
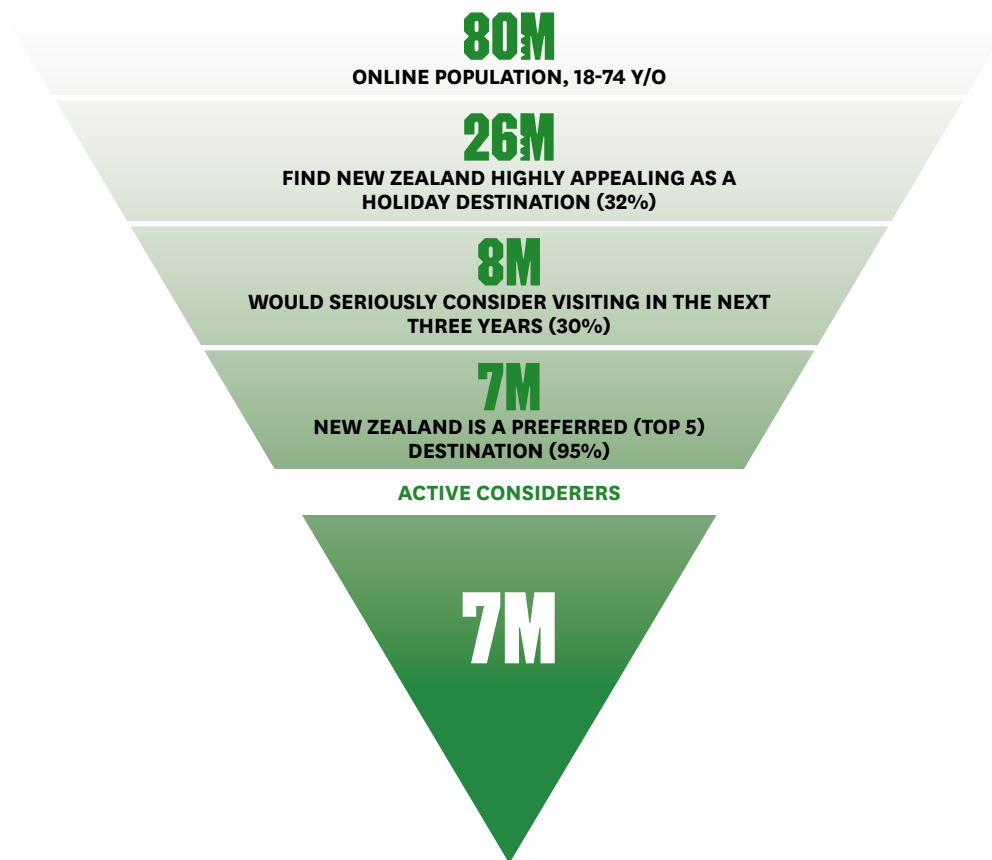
They are Tourism New Zealand's marketing audiences. These people are aged 18-74, find New Zealand highly appealing, have New Zealand as a preferred holiday destination within the next three years and a realistic budget for their trip.

JAPAN

ACTIVE CONSIDERERS



New Zealand appeals to 32% of Japan's online population aged 18-74 — that's 26 million people. Of these, 7 million would seriously consider visiting and have a realistic budget to do so — representing a sizeable pool of active considerers.



Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years and a realistic budget for their trip. Japanese indicate they are willing to spend at least ¥100,000 pp on a holiday to New Zealand.

Source: Active Considerer Monitor data 6-month period ending June 2025

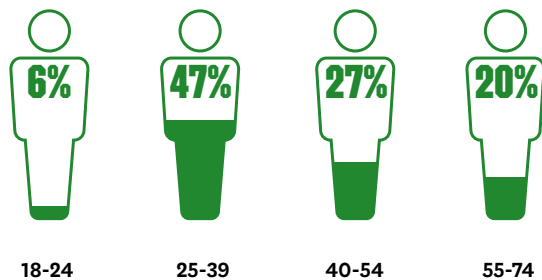
JAPAN

ACTIVE CONSIDERERS

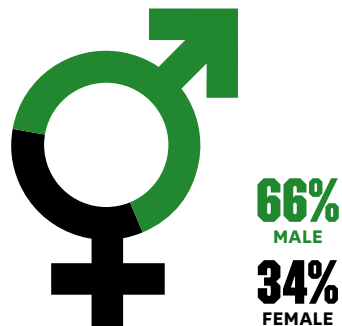


Active Considerers skew 25-39, largely reside in Tokyo and Kyoto and over 1 in 5 have a household income of over JPY 10 million

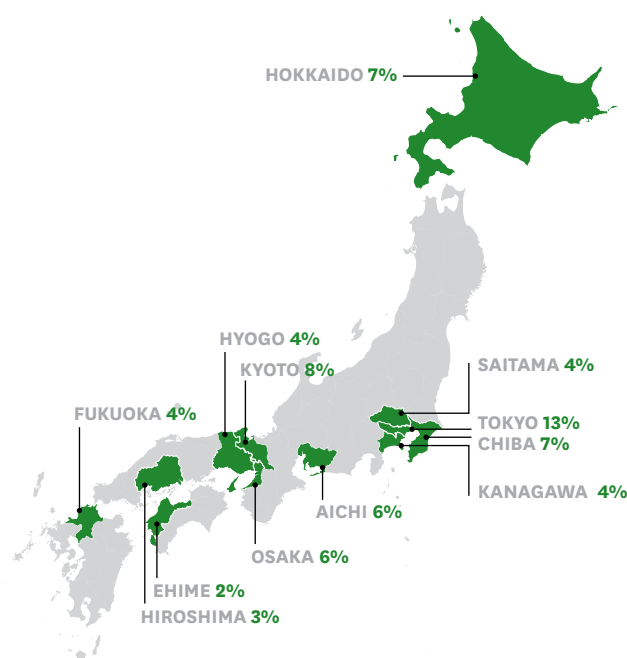
2/3 ACS ARE BETWEEN 25-54 Y/O (%)



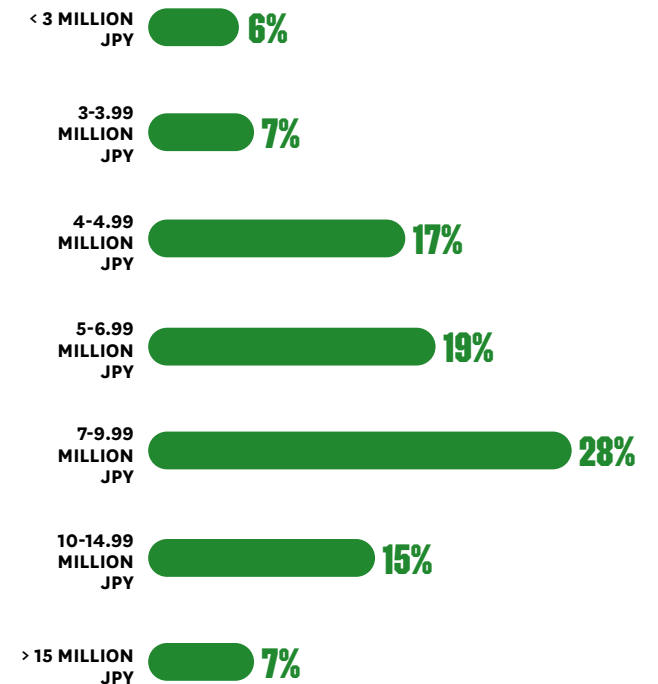
GENDER OF ACS



ACTIVE CONSIDERERS LIVE MAINLY IN TOKYO



ANNUAL HOUSEHOLD INCOME SPREAD - ACS



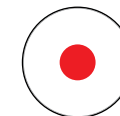
*Doesn't include those selecting 'prefer not to answer'

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JAPAN

ACTIVE CONSIDERERS



New Zealand is strongly associated with spectacular natural landscapes, excitement about visiting, amazing wildlife experiences, and a clean and unpolluted environment.

BRAND ASSOCIATIONS



SPECTACULAR NATURAL
LANDSCAPES AND SCENERY

72%



THINKING ABOUT VISITING
MAKES ME FEEL EXCITED

70%



HAS AMAZING WILDLIFE
EXPERIENCES

69%



THE ENVIRONMENT THERE
IS CLEAN AND UNPOLLUTED

67%



OFFERS EXPERIENCES THAT YOU
CANNOT GET ANYWHERE ELSE

65%



IDEAL TO RELAX
AND REFRESH

65%



IDEAL FOR HAVING FUN AND
ENJOYING YOURSELF

63%



OFFERS OPPORTUNITIES TO
EXPERIENCE LOCAL CULTURE

63%



HAS A UNIQUE
INDIGENOUS CULTURE

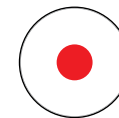
63%

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JAPAN

ACTIVE CONSIDERERS



New Zealand's beautiful landscapes, nature, enjoyment, and relaxation are key reasons to visit. Additionally, Japanese visitors seek to enjoy local food and beverages, among other experiences.

REASONS TO VISIT NEW ZEALAND



TO EXPERIENCE BEAUTIFUL
LANDSCAPES/SCENERY

50%



TO GET IN TOUCH
WITH NATURE

50%



TO FEEL RELAXED
AND REFRESHED

46%



TO INDULGE &
PAMPER MYSELF

39%



TO HAVE FUN &
ENJOY MYSELF

32%



TO ENJOY LOCAL FOOD
AND BEVERAGES

30%



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

29%



TO FEEL A SENSE
OF ADVENTURE

26%



TO CREATE LASTING MEMORIES
THROUGH PHOTOGRAPHY

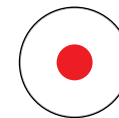
24%

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Source: Active Considerer Monitor data 6-month period ending June 2025

JAPAN

ACTIVE CONSIDERERS



The most popular activities among Active Considerers are scenic boat cruises, exploring main cities, and trying local cuisine.

ACTIVITIES SPARKING INTEREST AMONG THOSE INTENDING TO VISIT



SCENIC BOAT CRUISE

87%



EXPLORING MAIN CITIES

86%



TRYING LOCAL CUISINE

85%



BEACHES & COASTS

84%



VISITING NATIONAL PARKS, NATURE RESERVES OR FORESTS

84%



HISTORICAL SITES AND HERITAGE SITES

84%



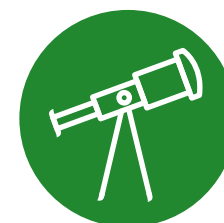
BATHING IN HOT/MUD POOLS

83%



EXPERIENCING LOCAL TOWNS

82%



STARGAZING

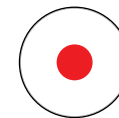
82%

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JAPAN

ACTIVE CONSIDERERS



Key knowledge gaps for prospective Japanese visitors include ease of transportation, food and beverage variety, flight duration, weather conditions and how welcoming locals are.

KNOWLEDGE GAPS FOR CHOOSING NEW ZEALAND AS A HOLIDAY



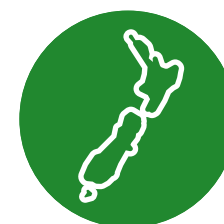
HOW EASY IT IS TO TRAVEL AROUND

35%



THE QUALITY AND VARIETY OF FOOD AND BEVERAGE OPTIONS

34%



THE LENGTH OF TIME REQUIRED TO FLY TO NEW ZEALAND

33%



WHAT THE WEATHER IS LIKE

31%



HOW WELCOMING THE LOCALS ARE

31%



WHAT PRACTICES ARE IN PLACE TO KEEP ME SAFE FROM COVID

30%



HOW SAFE IT IS FROM CRIME

27%



WHAT/WHERE THE RECOMMENDED THINGS TO SEE AND DO ARE

26%



WHAT TIME OF YEAR IS BEST TO DO THE ACTIVITIES I WANT TO

24%

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NGĀ MIHI