



# MARKET INSIGHTS GUIDES

Japan



**GAIN A DETAILED UNDERSTANDING  
OF DQ AND LWT'S GEOGRAPHIC  
FOCUS MARKETS THROUGH  
PROFILES THAT EXPLORE KEY DATA  
POINTS, TRAVELLER MOTIVATIONS,  
EXPERIENCE, EVOLVING TRENDS  
AND MARKET CONTEXTS**

The Market Insights Guides are designed to support members by providing useful insights into visitors from the RTO's key focus markets. Each guide includes up-to-date information on visitor behaviours, current trends, and what travellers are seeking to experience both in the Queenstown Lakes district and wider New Zealand.

The guides are informed by a range of reputable district and national data sources, including the Queenstown Lakes Visitor Experience Survey, New Zealand International Visitor Survey, and International Visitor Arrivals data. Slight variations between guides exist in cases where specific data or research is unavailable, or the sample size is limited.

*Unfortunately due to limited sample size Queenstown Lakes district insights are not available.*

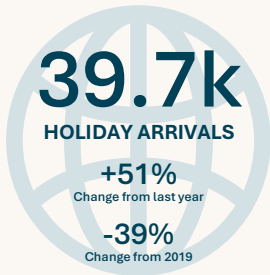
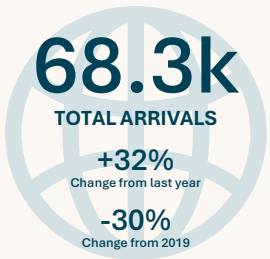
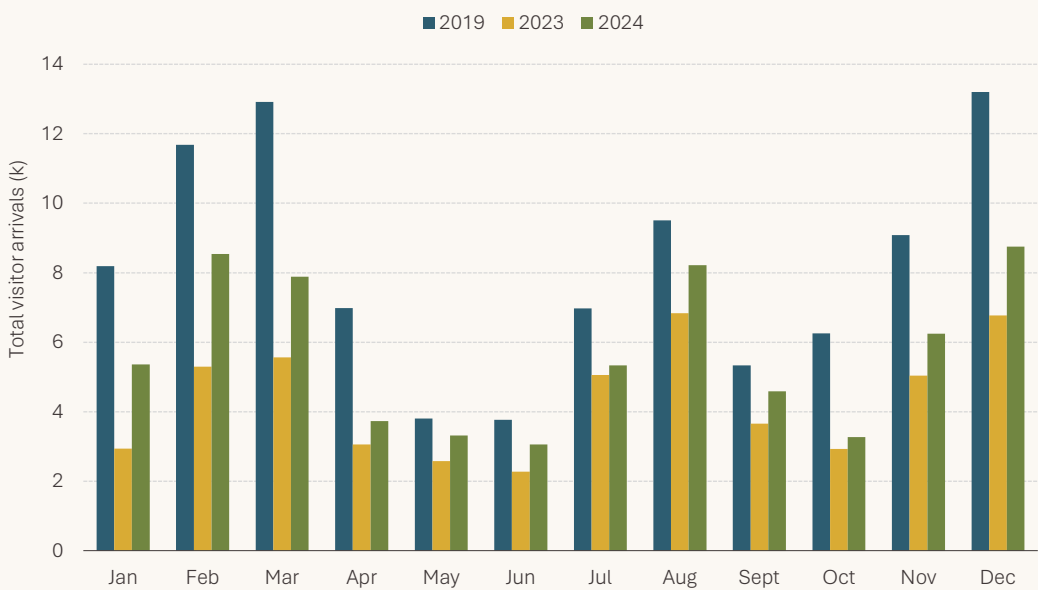


# NEW ZEALAND TRAVEL INSIGHTS

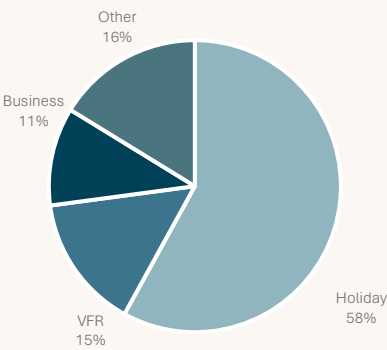
## INTERNATIONAL VISITOR ARRIVALS INSIGHTS

In 2024, New Zealand welcomed 68,253 international visitor arrivals from Japan, accounting for 2.1% of total international arrivals and making Japan New Zealand’s eitgh largest international visitor market. Of these, 39,699 were holiday visitors, representing 58% of total Japanese arrivals.

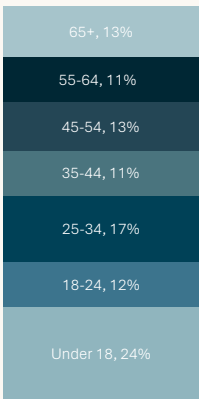
### INTERNATIONAL VISITOR ARRIVALS BY MONTH (2019 COMPARED TO 2023 AND 2024)



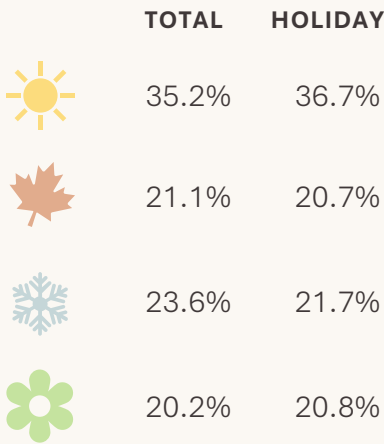
### PURPOSE OF VISIT



### AGE BREAKDOWN



### SEASONALITY





# NEW ZEALAND TRAVEL INSIGHTS

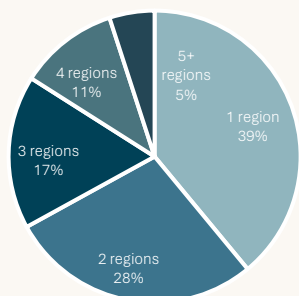
## NEW ZEALAND TRIP INSIGHTS

16% of Japanese visitors travelled to more than four regions in NZ. They spent approximately \$207 million, including \$128 million by holidaymakers. Average spend per trip was \$3,757, rising to \$3,855 for holiday visitors. Length of stay total is 24 days, with a length of stay of 16 days for holiday visitors.

### REGIONAL VISITATION

**16%**

OF VISITORS STAY A NIGHT IN 4+ REGIONS



Total visitors that stayed in

**31%**

QUEENSTOWN

**5%**

WĀNAKA

Holiday visitors that stayed in

**43%**

QUEENSTOWN

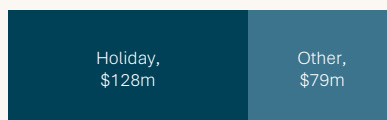
**7%**

WĀNAKA

### SPEND (\$M)

**\$207m**

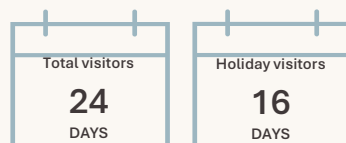
TOTAL MARKET SPEND



Total visitors  
**\$3,757**  
AVERAGE SPEND PER TRIP

Holiday visitors  
**\$3,855**  
AVERAGE HOLIDAY SPEND PER TRIP

### LENGTH OF STAY



### TOP FIVE MOTIVATORS FOR VISITING NEW ZEALAND



Its landscapes & scenery



It was somewhere new, I had never been there before



I've always wanted to visit



It's a safe place to visit and is less crowded



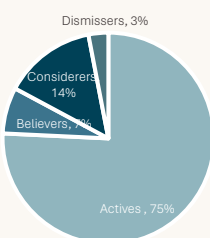
Friends, family or colleagues talked about or recommended it.

## SUSTAINABILITY AND TRAVEL FOR TRAVELLERS INTERESTED IN NZ

### SUSTAINABILITY MINDSET

**82%**

ACTIVE OR BELIEVERS



83% of Japanese people who find NZ an appealing holiday destination fall into Kantar's sustainability segments of Actives or Believers, higher than the Japan's average of 49%.

### CURRENT SUSTAINABLE TRAVEL CHOICES



**61%**

are willing to invest time and money to make sustainable choices

### FUTURE SUSTAINABLE TRAVEL CHOICES



**76%**

believe that in future they will have to increase efforts to travel in a more sustainable way.

### PERCEIVED BARRIERS THAT PREVENT SUSTAINABLE TRAVEL



More expensive



Hard to identify if operations are sustainable



Quality and comfort are a higher priority for me when travelling internationally

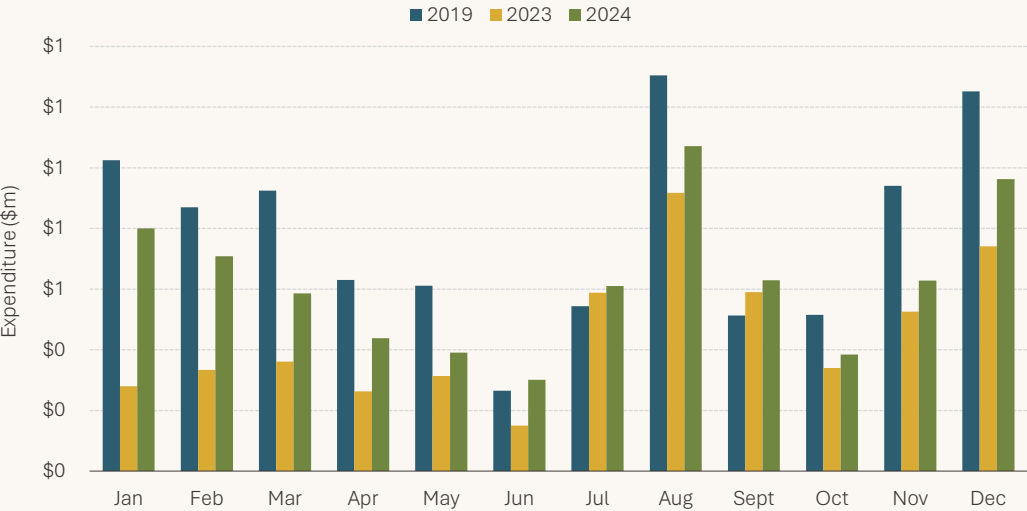


# QUEENSTOWN LAKES TRAVEL INSIGHTS

## TOURISM RELATED EXPENDITURE INSIGHTS

In 2024, total visitor expenditure from Japanese visitors in the Queenstown Lakes reached \$22.3 million, accounting for 2.1% of total international expenditure.

### EXPENDITURE (\$M) BY MONTH (2019 AND 2023 COMPARED TO 2024)







# MARKET CONTEXT INSIGHTS

## OVERVIEW

Japan is a highly developed island nation, known for its unique blend of traditional culture and advanced technology. Its society values harmony, respect, and education, contributing to a high standard of living and low crime rates. Environmentally, Japan faces challenges such as earthquakes and limited natural resources but is a global leader in disaster preparedness and sustainable practices. Economically, it boasts the world’s third-largest economy, driven by manufacturing, technology, and exports. Japan continues to innovate while addressing an aging population and environmental concerns.

## ECONOMIC

Japan's economy slowed in 2024, with GDP growing only 0.1%, but showed recovery in Q4 (+0.6%). Domestic demand strengthened slightly, supported by wage growth, while inflation stayed above the Bank of Japan's 2% target (CPI at 3.6% in March 2025). A moderate recovery is expected in 2025, with GDP forecast to grow 1.2%, driven by private/ household demand and business investment. Inflation should return to 2% by late 2025 or 2026. Key opportunities include exiting deflation and improving productivity, though challenges include global slowdown, trade risks, stagnant wage growth, high public debt, and an aging population.

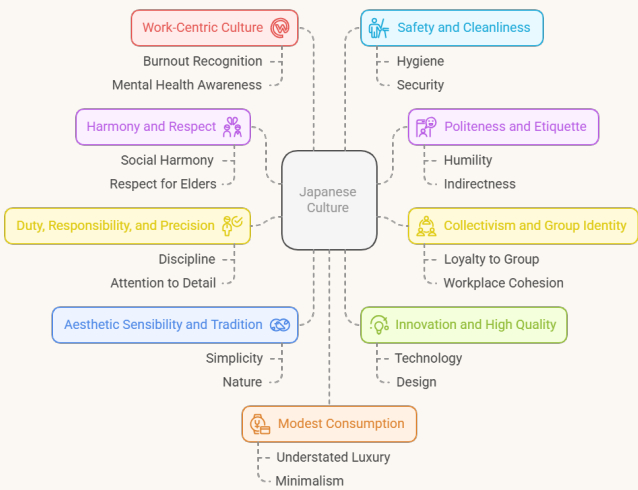
## ENVIRONMENT

Japan has reduced GHG emissions by 19% between 2013 and 2022 but remains reliant on fossil fuels and carbon-intensive practices. Waste management is advanced, with incineration, but recycling rates are low (~20%). Biodiversity pressures persist, particularly in agriculture and marine ecosystems. Japan targets a 46% GHG cut by 2030 and net-zero by 2050. The Green Transformation policy focuses on renewables, nuclear and hydrogen. However, current policies are projected to fall short of the 2030 target (31–37% cut). Opportunities include green tech innovation, while challenges include slow renewable deployment and circular economy policies.

## SOCIETY & CULTURE

Japan's population of around 123.4 million is in decline, with extreme aging (median age 49.5 and 29.1% aged 65+). Fertility is very low, around 1.14–1.3 child per family. While society remains largely homogenous, the number of foreign residents is slowly increasing. Income inequality has stabilised but remains a concern, particularly elderly poverty. Social cohesion, traditionally strong, is being strained by economic and demographic shifts. Population decline is expected to continue, dropping below 100 million by the 2050s, with those aged 65+ comprising around 40% of the population by 2070. Opportunities include tech solutions for labour and elderly care, while the primary challenge lies in managing the profound impacts of aging, depopulation, and adapting to changing social structures.

## VALUES AND MOTIVATIONS



# ABOUT

Destination Queenstown (DQ) and Lake Wānaka Tourism (LWT) are the Regional Tourism Organisations (RTOs) responsible for destination marketing, both domestically and internationally, and destination management, delivering selected initiatives from the Queenstown Lakes' destination management plan.

The RTOs' role is to market Queenstown and Wānaka as leading tourism destinations. This focuses on attracting high contributing visitors and supporting the delivery of the destination management plan to ensure we have a resilient and future focused industry, within a thriving community and environment. DQ and LWT communicate and connect with visitors to generate preference for our region and to create understanding of our place and our values. We help businesses to be resilient and prepared for the future through capability building and we engage with our community and show leadership in caring for our place.

The RTO strategy has evolved to support the goals of Travel to a Thriving Future, as well as continuing to support the visitor economy with values aligned marketing, product development and capability building in line with a regenerative tourism future.

## FOCUS GEOGRAPHIC MARKETS

The RTOs prioritise key geographic markets based on strategic considerations, including aviation connectivity, the likelihood of visitors choosing Queenstown/Wānaka, and alignment with the behaviours of high-contributing visitors. This approach maximises return on investment for members while enabling effective collaboration with partners such as Tourism New Zealand. By aligning with Tourism New Zealand's international marketing efforts, the impact of regional initiatives can be further amplified.

### PRIORITY FOCUS MARKETS

- New Zealand
- Australia
- China
- United States of America

### SECONDARY FOCUS MARKETS

- India
- Southeast Asia (Malaysia, Singapore, Indonesia)
- United Kingdom
- Europe (Germany)

### ADDITIONAL MARKET PRESENCE

- Japan
- South Korea

# SOURCES

## NEW ZEALAND TRAVEL INSIGHTS

International Visitor Arrivals Insights, based on International Visitor Arrivals data (year ended December 2024), accessed via [Infoshare, Stats NZ](#) on 15 March 2025.

New Zealand Trip Insights, based on International Visitor Survey data (year ended December 2024), accessed via [Tourism New Zealand International Visitor Survey Dashboard](#) on 15 March 2025. Time period: 1 January 2023 – 31 December 2024. Sample size: Japan total respondents (n = 603); Japan holiday respondents (n = 369).

Intersect of Sustainability and Travel Insights, based on Tourism New Zealand research [The Role of Sustainability in Destination and Operator Choice](#) (December 2023), accessed on 16 March 2025.

## QUEENSTOWN LAKES TRAVEL INSIGHTS

Tourism Related Expenditure Insights, based on Marketview data (year ended December 2024), accessed through Marketview Council Tool on 28 March 2025.

## MARKET CONTEXT INSIGHTS

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