VISION INSIGHTS

Vision Insights Japan Traveler Profiles 2024

January 24, 2025



STATE OF HAWAI'I • DEPARTMENT OF BUSINESS ECONOMIC DEVELOPMENT & TOURISM



AUTHORITY

Vision Insights Syndicated Survey

- DBEDT subscribes to Vision Insight's Brand Health and Profiles databases for the U.S., Canada, Japan, Australia, and Korea
- Consumers are surveyed each day
- DBEDT receives access to new data each week for selected traveler profile segments for the U.S., Canada, Japan, Australia, and Korea

Japan - Segment Definitions

Avid Traveler

- Gross household income is 10M+ yen
- Age is 25-45
- Married or living with partner
- Might or might not have children
- Employed full time
- Either took an international vacation in the past 12 months, very likely/likely to book a flight in the next 12 months, or book a vacation using online agencies/websites

Nationally Representative Sample (Nat Rep)

• Representative of Japan adults in terms of age, gender, social class and education

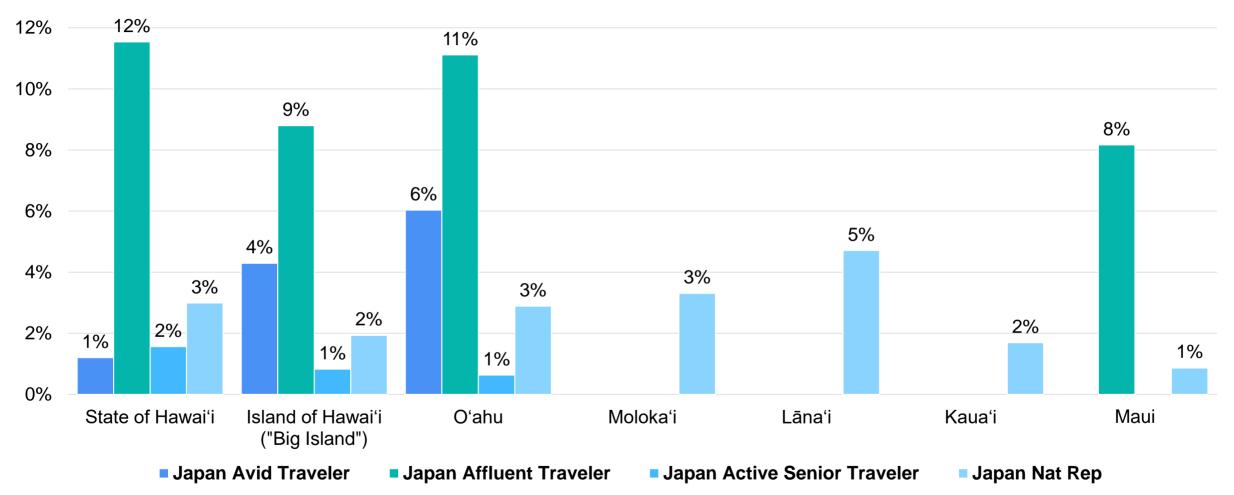
Affluent Traveler

- Gross household income is 15M+ yen
- Age is 35-60
- Married or living with partner
- Might or might not have children
- Employed full time
- Either took an international vacation in the past 12 months, very likely/likely to book a flight in the next 12 months, family friendly locations and activities are important, or comfort and accessibility is important

Active Senior Traveler

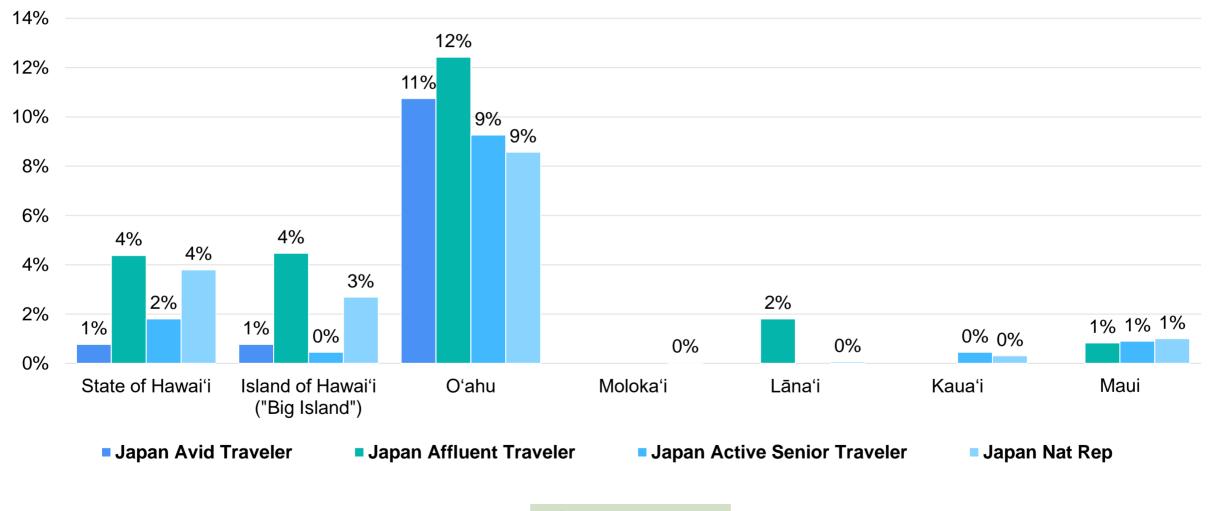
- Gross household income is greater than 1.95M+ yen
- Age is 65-75
- Belongs to a frequent flyer program
- Becomes aware of travel destinations on TV, radio, or newspaper

Japan - Leisure Trip in Past 12 Months



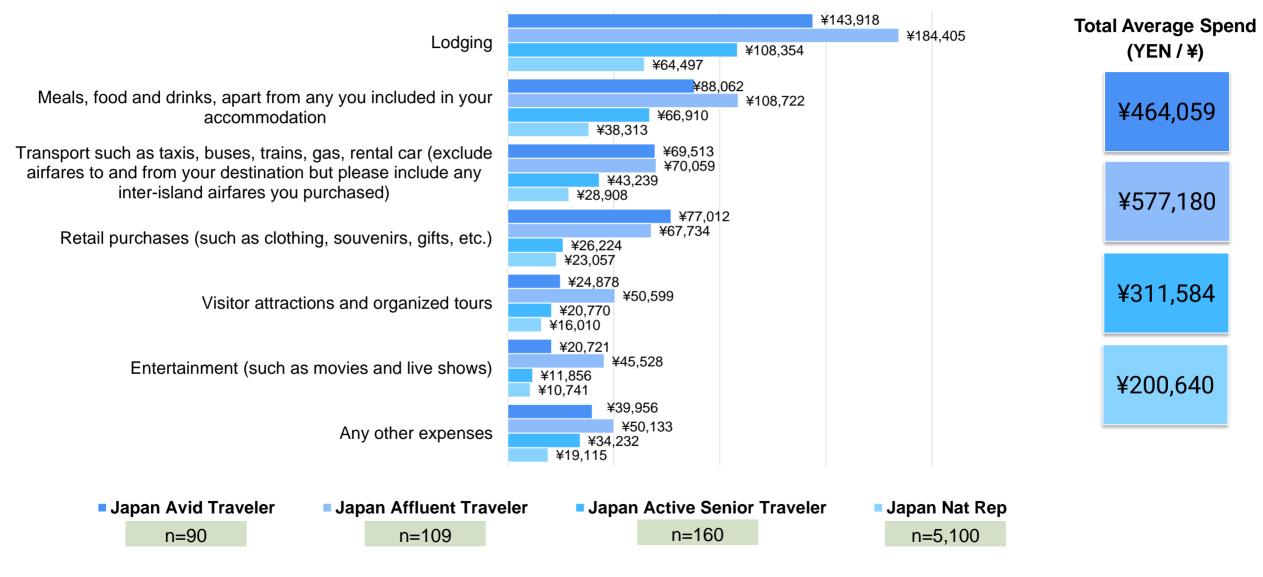
Sample Min. n=50

Japan - Next Destination for Leisure Trip



Sample Min. n=50

Japan - Total Annual Holiday Spend



January 24, 2025 Using your best estimate, please indicate how much you / your household spend(s) on your annual vacation in total for each of the following budget line items. If you or your group did not spend money in one of the categories, please put a zero in the box next to it.

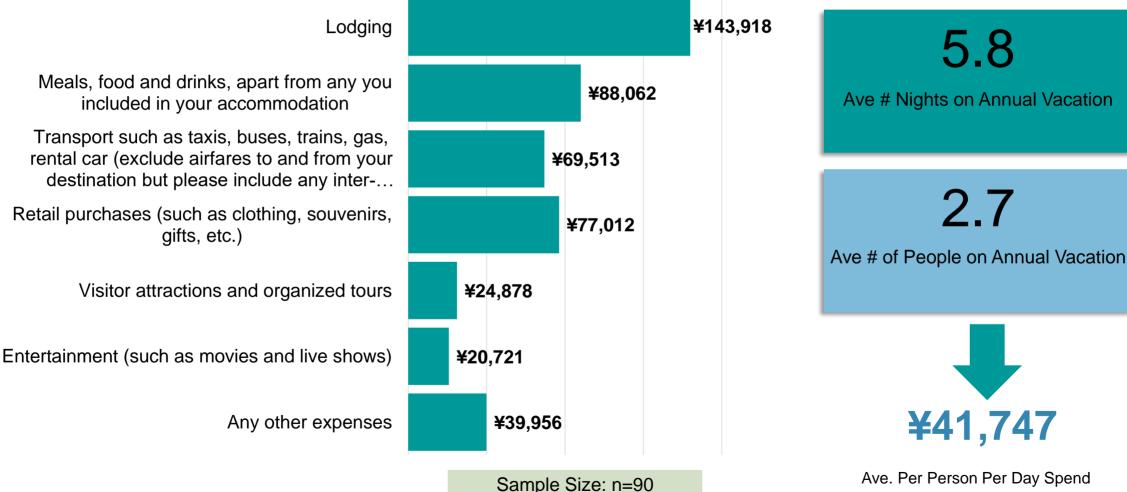
Japan Avid Travelers: Annual Vacation **Distance Travelled on Annual Vacation** 0-500 miles 29% 501-1,000 miles 23% 5,001+ miles 5% 3,001-5,000 miles 15% 1,001-3,000 miles 28% Sample Size: n=90

January 24, 2025 How far do you normally travel for your annual vacation? | Typically, for how many nights do you travel for your annual vacation? | Including yourself, how many individuals typically travel with you on your annual vacation? | Using your best estimate, please indicate how much you / your household spend(s) on your annual vacation **in total** for each of the following budget line items. If you or your group did not spend money in one of the categories, please put a zero in the box next to it.

Japan Avid Travelers: Annual Vacation

Average Spend

January 24, 2025



Spend Per Person Per Day

5.8

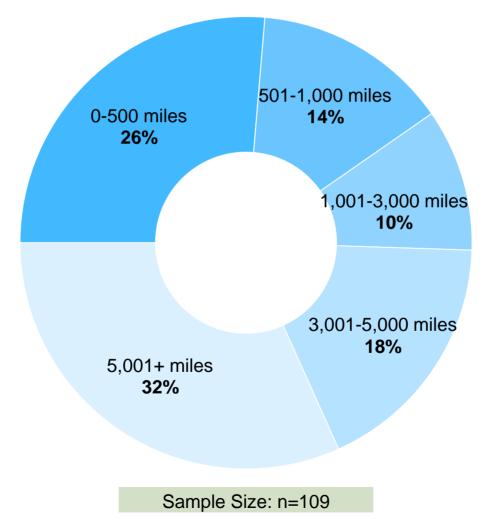
2.7

¥41,747

How far do you normally travel for your annual vacation? | Typically, for how many nights do you travel for your annual vacation? | Including yourself, how many individuals typically travel with you on your annual vacation? | Using your best estimate, please indicate how much you / your household spend(s) on your annual vacation in total for each of the following budget line items. If you or your group did not spend money in one of the categories, please put a zero in the box next to it.

Japan Affluent Travelers: Annual Vacation

Distance Travelled on Annual Vacation



January 24, 2025 How far do you normally travel for your annual vacation? | Typically, for how many nights do you travel for your annual vacation? | Including yourself, how many individuals typically travel with you on your annual vacation? | Using your best estimate, please indicate how much you / your household spend(s) on your annual vacation **in total** for each of the following budget line items. If you or your group did not spend money in one of the categories, please put a zero in the box next to it.

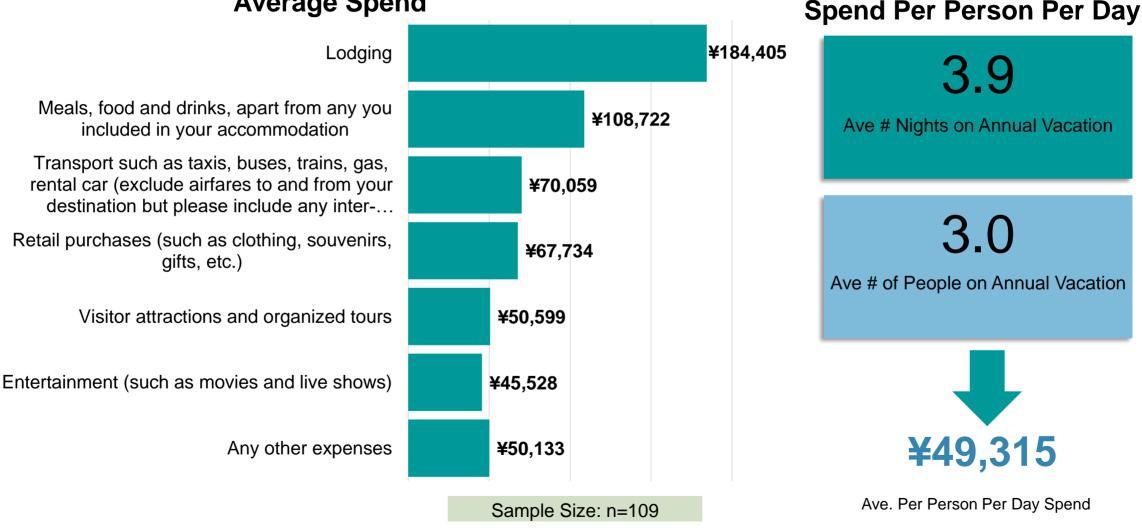
Japan Affluent Travelers: Annual Vacation

Average Spend

January 24, 2025

in the box next to it.

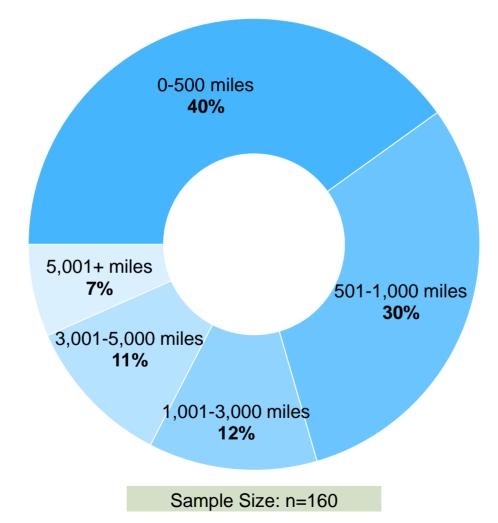
10



How far do you normally travel for your annual vacation? | Typically, for how many nights do you travel for your annual vacation? | Including yourself, how many individuals typically travel with you on your annual vacation? | Using your best estimate, please indicate how much you / your household spend(s) on your annual vacation in total for each of the following budget line items. If you or your group did not spend money in one of the categories, please put a zero

Japan Active Senior Travelers: Annual Vacation

Distance Travelled on Annual Vacation



January 24, 2025 How far do you normally travel for your annual vacation? | Typically, for how many nights do you travel for your annual vacation? | Including yourself, how many individuals typically travel with you on your annual vacation? | Using your best estimate, please indicate how much you / your household spend(s) on your annual vacation **in total** for each of the following budget line items. If you or your group did not spend money in one of the categories, please put a zero in the box next to it.

Japan Active Senior Travelers: Annual Vacation

January 24, 2025

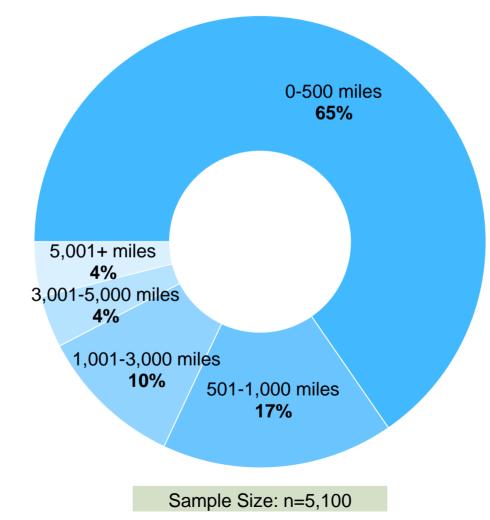
Average Spend Spend Per Person Per Day Lodaina ¥108.354 3.3Meals, food and drinks, apart from any you ¥66.910 Ave # Nights on Annual Vacation included in your accommodation Transport such as taxis, buses, trains, gas, rental car (exclude airfares to and from your ¥43,239 destination but please include any inter-... 2.5 Retail purchases (such as clothing, souvenirs, ¥26,224 gifts, etc.) Ave # of People on Annual Vacation Visitor attractions and organized tours ¥20,770 Entertainment (such as movies and live shows) ¥11.856 ¥38,454 ¥34,232 Any other expenses Ave. Per Person Per Day Spend Sample Size: n=160

How far do you normally travel for your annual vacation? | Typically, for how many nights do you travel for your annual vacation? | Including yourself, how many individuals typically travel with you on your annual vacation? | Using your best estimate, please indicate how much you / your household spend(s) on your annual vacation in total for each of the following budget line items. If you or your group did not spend money in one of the categories, please put a zero in the box next to it.

Japan Nat Rep: Annual Vacation

January 24, 2025

Distance Travelled on Annual Vacation



How far do you normally travel for your annual vacation? | Typically, for how many nights do you travel for your annual vacation? | Including yourself, how many individuals typically travel with you on your annual vacation? | Using your best estimate, please indicate how much you / your household spend(s) on your annual vacation **in total** for each of the following budget line items. If you or your group did not spend money in one of the categories, please put a zero in the box next to it.

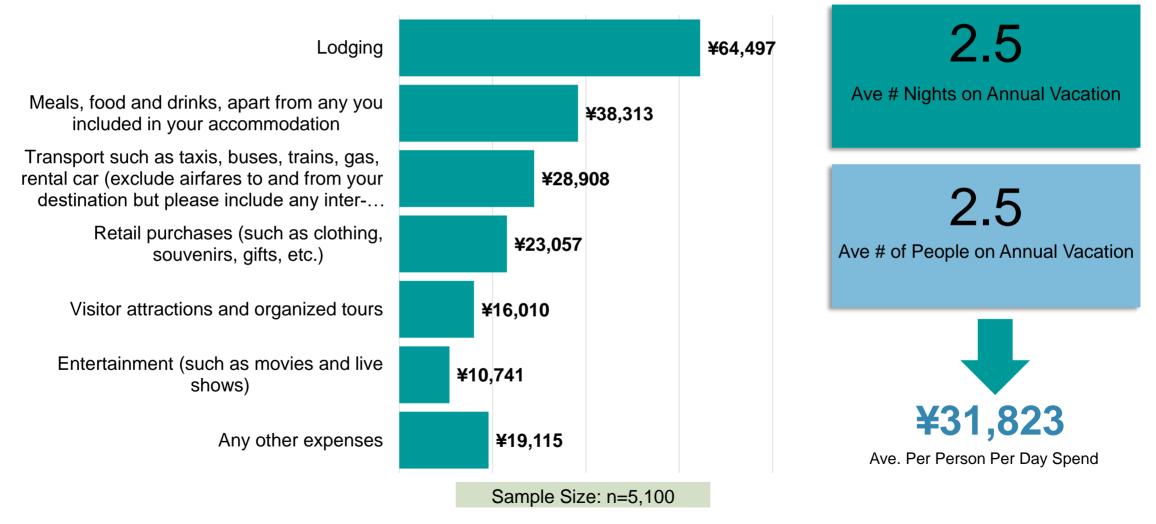
Japan Nat Rep: Annual Vacation

Average Spend

14

January 24, 2025

Spend Per Person Per Day



How far do you normally travel for your annual vacation? | Typically, for how many nights do you travel for your annual vacation? | Including yourself, how many individuals typically travel with you on your annual vacation? | Using your best estimate, please indicate how much you / your household spend(s) on your annual vacation in total for each of the following budget line items. If you or your group did not spend money in one of the categories, please put a zero in the box next to it.

Japan - Importance of Travel Factors

		Very Impo	rtant 5	
	Japan: Avid Traveler	Japan: Affluent Traveler	Japan: Active Senior Traveler	Japan Market
Value for money	36%	31%	15%	28%
Comfort and accessibility	42%	41%	26%	36%
Natural attractions/activities	28%	27%	15%	23%
Family friendly locations and activities	32%	39%	15%	24%
Opportunity to experience local restaurants/businesses	23%	30%	17%	17%
Cultural attractions	28%	21%	21%	22%
Entertainment and nightlife	22%	23%	7%	14%
Consideration of sustainable principles	13%	19%	7%	10%
Safe and Secure Destination*	56%	52%	61%	58%
Sample Size:	n=90 *n=80	n=109 *n=90	n=160 *n=132	n=5,100 *n=4,284

January 24, 2025 How important are the following factors in choosing your travel destination. Please rate the following list with 1 = not very important and 5 = very important? *Because this travel factor was added in March 2024, the sample size of each segment for this particular travel factor is smaller than those of the other travel factors.

Japan Avid Travelers: Importance of Travel Factors

	Value for money	Comfort and accessibility	Natural attractions/ activities	Family friendly locations and activities	Opportunity to experience local restaurants/ businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination*
Very Important 5	36%	42%	28%	32%	23%	28%	22%	13%	56%
■4	37%	39%	40%	46%	38%	40%	24%	14%	30%
■3	23%	18%	19%	19%	29%	24%	31%	42%	9%
2	4%	1%	7%	1%	6%	5%	12%	15%	1%
Not very Important 1	0%	1%	7%	1%	4%	3%	12%	16%	4%

Not very Important 1 2 ■3 ■4

Very Important 5

Sample Size: n=90

January 24, 2025

Japan Affluent Travelers: Importance of Travel Factors

									-
									-
	Value for money	Comfort and accessibility	Natural attractions/ activities	Family friendly locations and activities	Opportunity to experience local restaurants/ businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination*
Very Important 5	31%	41%	27%	39%	30%	21%	23%	19%	52%
■ 4	29%	40%	37%	32%	38%	44%	27%	15%	28%
■3	23%	15%	29%	18%	16%	25%	37%	37%	8%
2	12%	1%	4%	4%	13%	4%	8%	11%	1%
Not very Important 1	5%	3%	4%	7%	3%	5%	5%	18%	10%

Not very Important 1

3

∎4

Very Important 5

Sample Size: n=109

2

17 January 24, 2025

Japan Active Senior Travelers: Importance of Travel Factors

	_								
									-
	Value for money	Comfort and accessibility	Natural attractions/ activities	Family friendly locations and activities	Opportunity to experience local restaurants/ businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination
Very Important 5	15%	26%	15%	15%	17%	21%	7%	7%	61%
■ 4	43%	62%	51%	45%	38%	51%	26%	28%	34%
■3	34%	9%	22%	27%	30%	20%	36%	39%	4%
2	8%	1%	9%	7%	10%	8%	24%	25%	0%
Not very Important 1	0%	1%	4%	5%	5%	0%	7%	2%	0%

Not very Important 1

3

■4

Very Important 5

Sample Size: n=160

2

January 24, 2025

Japan Nat Rep: Importance of Travel Factors

									_
									_
									_
									-
	-		-			-	-		-
				-				-	-
				-	-			-	
	Value for money	Comfort and accessibility	Natural attractions/ activities	Family friendly locations and activities	Opportunity to experience local restaurants/ businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles	Safe and secure destination*
Very Important 5	28%	36%	23%	24%	17%	22%	14%	10%	58%
■4	33%	41%	37%	32%	32%	37%	27%	20%	26%
■3	30%	18%	28%	29%	33%	29%	37%	43%	12%
2	5%	3%	7%	8%	9%	7%	13%	14%	2%
Not very Important 1	4%	2%	5%	7%	9%	4%	9%	13%	2%

Not very Important 1 2

3

■4

Very Important 5

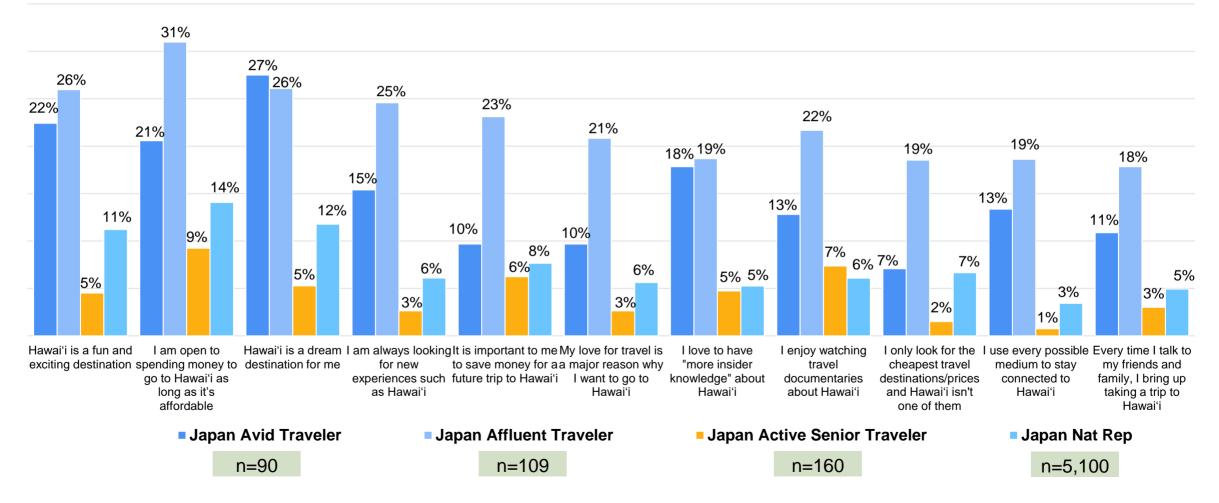
Sample Size: n=5,100

January 24, 2025

Japan - Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as a Travel Destination

(Strongly Agree)



Japan Avid Travelers: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

ı	5%	23	%		1	47%			22	%
;		21%				53%			21	%
,	6% 7%	0	25%			35%			27%	
i	12	%	3	0%			38%			15%
i	7%		4	2%			38	8%		10%
i	179	%		32%			40	%		10%
i	11%	6	Э	84%			33%		1	8%
i	10%			44%			32	2%		13%
Ì	6%	22%	, D		37%)		29%	, D	7%
i	8%	16%		31	%		32	2%		13%
i	7%	17%		309	%		36	6%		11%

Hawai'i is a fun and exciting destination I am open to spending money to go to Hawai'i as long as it's affordable Hawai'i is a dream destination for me I am always looking for new experiences such as Hawai'i It is important to me to save money for a future trip to Hawai'i My love for travel is a major reason why I want to go to Hawai'i I love to have "more insider knowledge" about Hawai'i I enjoy watching travel documentaries about Hawai'i I only look for the cheapest travel destinations/prices and Hawai'i isn't one of them I use every possible medium to stay connected to Hawai'i Every time I talk to my friends and family, I bring up taking a trip to Hawai'i

Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

Japan Affluent Travelers: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

ו	7%		25%			38%			26%
'	1 /0		2370			50 /0			2070
9	7%	20	%		39%	, ວ			31%
e	8%	10%		30%		2	5%		26%
i	7% 7	%	36	5%		2	6%		25%
i	8% 6	5%	329	%		31	۱%		23%
i	8%	6%	3	86%			28%		21%
i	7% 6	%	36	%			33%		19%
i	7% 7	'%	32	%		3	2%		22%
ı	15%	6 1	4%	3	88%			15%	19%
i	10%	15%	, D	36%)		2	1%	19%
i	10%	14%		33%			25	5%	18%

Hawai'i is a fun and exciting destination I am open to spending money to go to Hawai'i as long as it's affordable Hawai'i is a dream destination for me I am always looking for new experiences such as Hawai'i It is important to me to save money for a future trip to Hawai'i My love for travel is a major reason why I want to go to Hawai'i I love to have "more insider knowledge" about Hawai'i I enjoy watching travel documentaries about Hawai'i I only look for the cheapest travel destinations/prices and Hawai'i isn't one of them I use every possible medium to stay connected to Hawai'i Every time I talk to my friends and family, I bring up taking a trip to Hawai'i

Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

Japan Active Senior Travelers: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

5%	32%				58%				5%
249	%			65%	%				9%
10%		48%				3	86%		5%
9%		60	%					27%	
14%		42%				37	7%		6%
15%			59%					24%	
9%		54%					33%	6	5%
7%	2	46%				36	5%		7%
18%			54%					24%	
21%	,		59	9%				18	%
259	%		48	%				23%	

Hawai'i is a fun and exciting destination I am open to spending money to go to Hawai'i as long as it's affordable Hawai'i is a dream destination for me I am always looking for new experiences such as Hawai'i It is important to me to save money for a future trip to Hawai'i My love for travel is a major reason why I want to go to Hawai'i I love to have "more insider knowledge" about Hawai'i I enjoy watching travel documentaries about Hawai'i I only look for the cheapest travel destinations/prices and Hawai'i isn't one of them I use every possible medium to stay connected to Hawai'i Every time I talk to my friends and family, I bring up taking a trip to Hawai'i

Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

Japan Nat Rep: Hawai'i as an Aspirational Destination

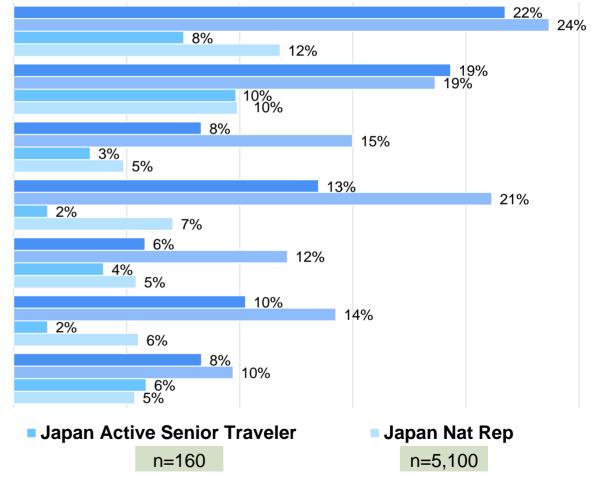
Agreement Regarding Hawai'i as an Aspirational Destination

5%	40%		41%		11%
5%	36%		41%		14%
<mark>5%</mark> 9%	44%		3	1%	12%
10%	52	2%		28%	6%
6% 10%	48	3%		28%	8%
6% 13%		53%		22%	6%
10%	Ę	55%		25%	5%
<mark>5%</mark> 11%		53%		24%	6%
12%		56%		22%	7%
7% 15%		58%		1	6%
10% 16	5%	50%		19	% 5%

Hawai'i is a fun and exciting destination I am open to spending money to go to Hawai'i as long as it's affordable Hawai'i is a dream destination for me I am always looking for new experiences such as Hawai'i It is important to me to save money for a future trip to Hawai'i My love for travel is a major reason why I want to go to Hawai'i I love to have "more insider knowledge" about Hawai'i I enjoy watching travel documentaries about Hawai'i I only look for the cheapest travel destinations/prices and Hawai'i isn't one of them I use every possible medium to stay connected to Hawai'i Every time I talk to my friends and family, I bring up taking a trip to Hawai'i

Strongly disagree Disagree Neither agree nor disagree Agree Strongly agree

Japan - Sustainability and Travel Responsibility Statements Agreement Regarding Sustainable Practices While Traveling (Strongly Agree)



feel personal responsibility to take care of the places I visit

practice 'leave no trace' when traveling to protect the environment

care about the environment and take extra steps to travel in an environmentally responsible way

prioritize comfort and value for money over environmentally friendly 'green' practices

take the time to learn about local norms and standards prior to travelling to a destination to reduce my impact on the...

would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation

would be willing to pay more for tourism destinations that have explicit components that are environmentally friendly (e.g., reduction of...



Japan - Sustainability and Travel Responsibility Statements Agreement Regarding Sustaining Local Culture While Traveling (Strongly Agree)

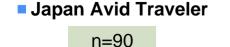
I prefer to shop at local markets and/or make purchases from local artisans & crafts people while traveling

I would like to be offered locally sourced food and drink where possible

Sustaining the local culture and community is as important as sustaining the environment to me

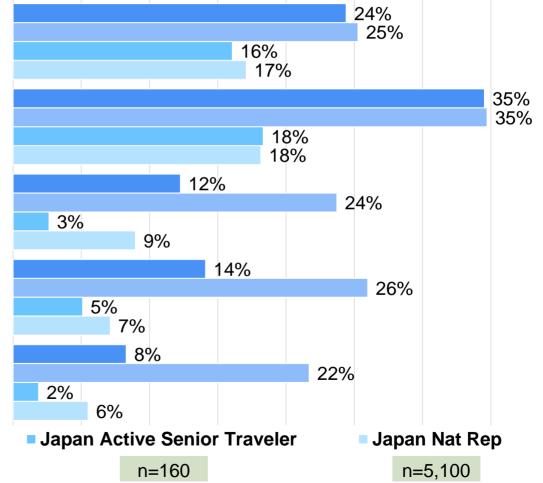
I seek out meaningful experiences with the local population in the places I visit

When I travel, I want to understand the destination and 'live like a local' through informed decisions



Japan Affluent Traveler

n=109



Japan Avid Travelers: Sustainability and Travel Responsibility Statements

27

Agreement Regarding Sustainable Practices While Traveling

feel personal responsibility to take care of the places I visit		33%	52	2%	12%
practice 'leave no trace' when traveling to protect the environment		37%		49%	10%
care about the environment and take extra steps to travel in an environmentally responsible way	7%	5	4%	32%	5%
prioritize comfort and value for money over environmentally friendly 'green' practices	11%	2	18%	32%	7%
take the time to learn about local norms and standards prior to travelling to a destination to reduce my impact on the environment/historic sites	7%	51	%	35%	5%
would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation	5%	51%	,	37%	6%
would be willing to pay more for tourism destinations that have explicit components that are environmentally friendly (e.g., reduction of waste,	7%	509	%	36%	5%
Strongly disagree	ree nor	disagree ■Ag	gree Strongly	agree	
Sample	Size: n=	:90			

Japan Avid Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling



43% 43% 9% 33% 7% 52% 54% 28% 6%

45%

49%

17%

18%

Strongly disagree Disagree Neither agree nor disagree Aaree Strongly agree

Sample Size: n=90

Japan Affluent Travelers: Sustainability and Travel Responsibility Statements

29

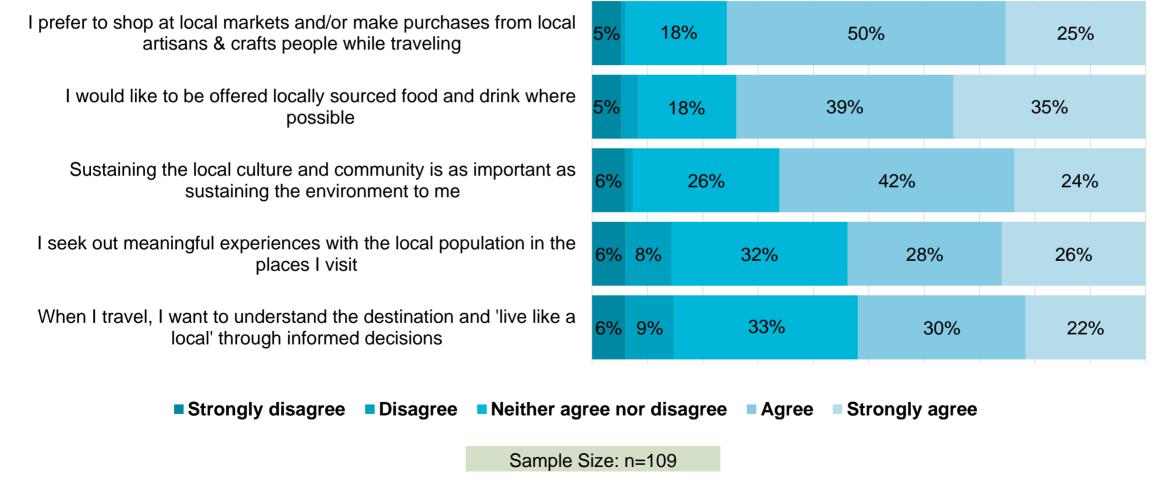
Agreement Regarding Sustainable Practices While Traveling

feel personal responsibility to take care of the places I visit	6%		19%		50%		2	24%
practice 'leave no trace' when traveling to protect the environment	9)%	19%		50)%		19%
care about the environment and take extra steps to travel in an environmentally responsible way		13%		35%		33%		15%
prioritize comfort and value for money over environmentally friendly 'green' practices	9%	,		44%		26%		21%
take the time to learn about local norms and standards prior to travelling to a destination to reduce my impact on the environment/historic sites	7%	9%		28%		44%		12%
would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation	7%	8%		34%		37%		14%
would be willing to pay more for tourism destinations that have explicit components that are environmentally friendly (e.g., reduction of waste,	10%	6 9	%	31%		41%		10%
Strongly disagree Disagree Neither ag			-	Agree	Stron	gly agree		

Japan Affluent Travelers: Sustainability and Travel Responsibility Statements

30

Agreement Regarding Sustaining Local Culture While Traveling



Japan Active Senior Travelers: Sustainability and Travel Responsibility Statements

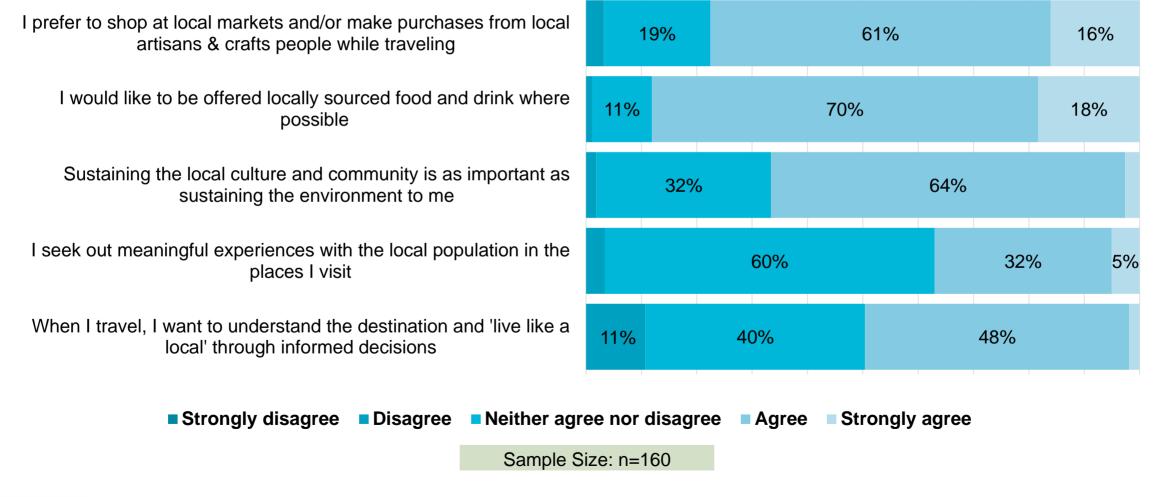
Agreement Regarding Sustainable Practices While Traveling

feel personal responsibility to take care of the places I visit	15%		76%		8%
practice 'leave no trace' when traveling to protect the environment	289	%	619	%	10%
care about the environment and take extra steps to travel in an environmentally responsible way	5%	56%		36%	
prioritize comfort and value for money over environmentally friendly 'green' practices	13%	5	59%	23	%
take the time to learn about local norms and standards prior to travelling to a destination to reduce my impact on the environment/historic sites	5%	48%		43%	
would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation		55%		41%	
would be willing to pay more for tourism destinations that have explicit components that are environmentally friendly (e.g., reduction of waste,		44%		45%	6%
Strongly disagree Disagree Neither ag	ree nor dis	sagree Agree	Strongly	agree	

Japan Active Senior Travelers: Sustainability and Travel Responsibility Statements

32

Agreement Regarding Sustaining Local Culture While Traveling



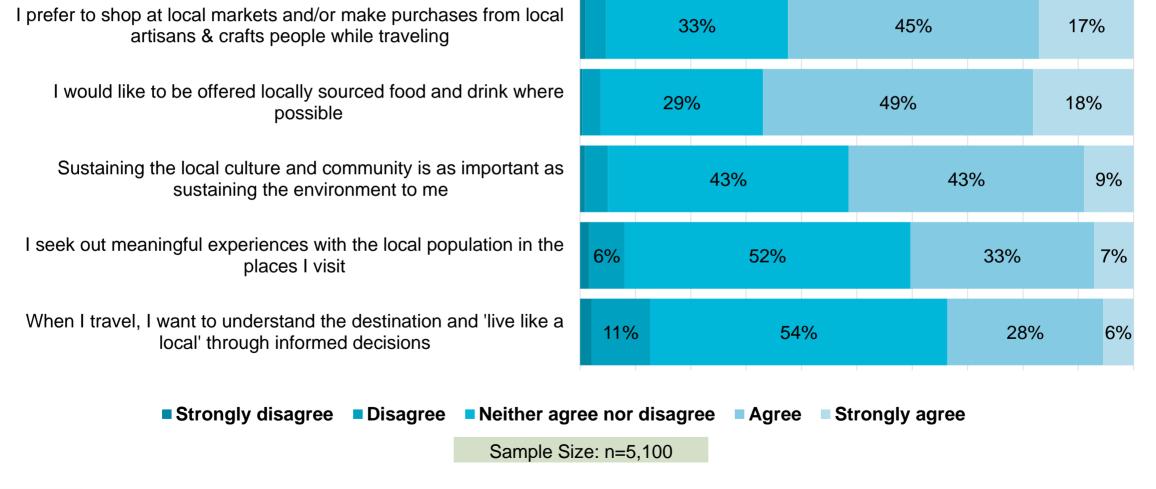
Japan Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

feel personal responsibility to take care of the places I visit		33%		52%		12%
practice 'leave no trace' when traveling to protect the environment		37%		49%		10%
care about the environment and take extra steps to travel in an environmentally responsible way	7%	54	%		32%	5%
prioritize comfort and value for money over environmentally friendly 'green' practices	11%	49	9%		31%	7%
take the time to learn about local norms and standards prior to travelling to a destination to reduce my impact on the environment/historic sites	7%	51%			35%	5%
would like to have information about the sustainable management policies of hotels and guesthouses when booking accommodation	5%	51%			37%	6%
would be willing to pay more for tourism destinations that have explicit components that are environmentally friendly (e.g., reduction of waste,	7%	50%	,	1	36%	5%
Strongly disagree			ee Strongly	/ agree		
Sample S	5,100					

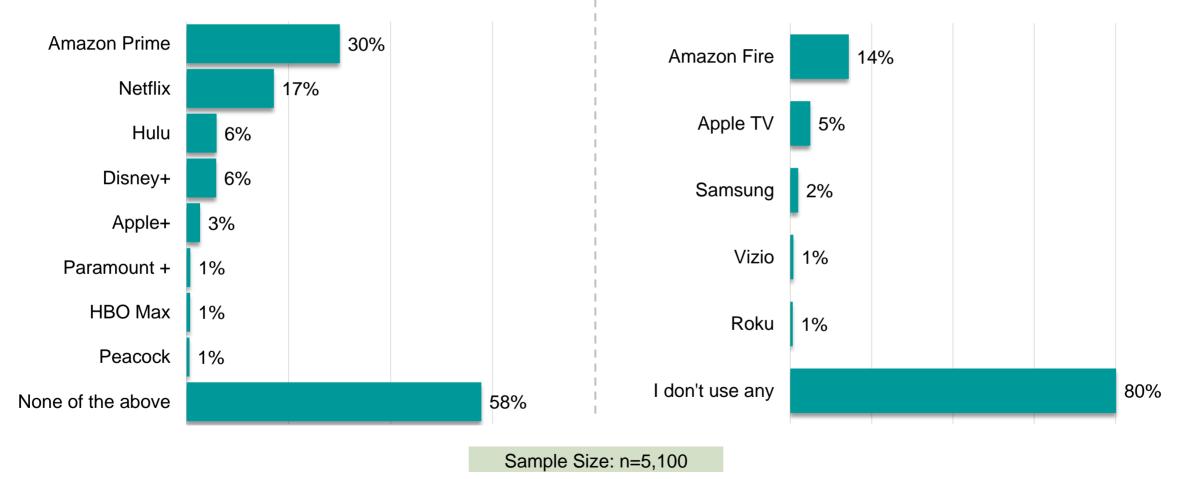
Japan Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling



Japan Media Consumption

Streaming Platforms Used Weekly



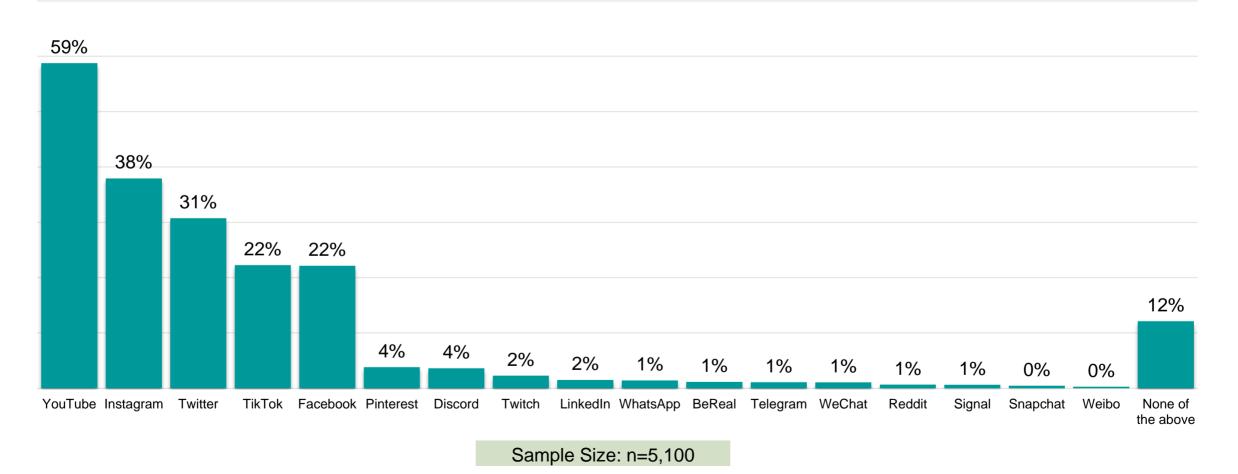
Connected Device Used

Which of the following streaming platforms do you view on a weekly basis, if any? Select all that apply. | Which Connected TV/Streaming Device do you currently use to view content? | Which of the following social media platforms and/or instant messaging apps have you used in the past week? | In which of the following ways did you become aware of various travel destinations to consider? | After seeing a travel destination, whether on TV, online, through social media or other channels, what actions do you typically take? **Select all that apply**

35 January 24, 2025

Japan Media Consumption

Social Media Platforms Used Weekly



Which of the following streaming platforms do you view on a weekly basis, if any? Select all that apply. | Which Connected TV/Streaming Device do you currently use to view content? | Which of the following social media platforms and/or instant messaging apps have you used in the past week? | In which of the following ways did you become aware of various travel destinations to consider? | After seeing a travel destination, whether on TV, online, through social media or other channels, what actions do you typically take? **Select all that apply**

36 January 24, 2025

Japan Media Consumption

Travel Destination Source of Awareness

TV Program/Documentary	40%
Online	34%
Radio	4%
TV commercials	23%
Newspaper	13%
Friends/Family	35%
Social Media	29%
YouTube	32%
Out of Home Advertising (e.g., poster billboards, bus shelter advertisements, etc.)	11%
Email	6%
l don't recall	11%

Actions Taken After Seeing an Ad for a Destination

I go to the destination's website	36%
I search for information about the destination online	52%
I look up the destination on social media	23%
I talk to friends/family about the destination	30%
I book travel to the destination almost immediately	4%
I don't do anything	13%
None of the above	9%

Which of the following streaming platforms do you view on a weekly basis, if any? Select all that apply. | Which Connected TV/Streaming Device do you currently use to view content? | Which of the following social media platforms and/or instant messaging apps have you used in the past week? | In which of the following ways did you become aware of various travel destinations to consider? | After seeing a travel destination, whether on TV, online, through social media or other channels, what actions do you typically take? **Select all that apply**