



Vision Insights Japan Traveler Profiles 2024

January 24, 2025



STATE OF HAWAII • 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

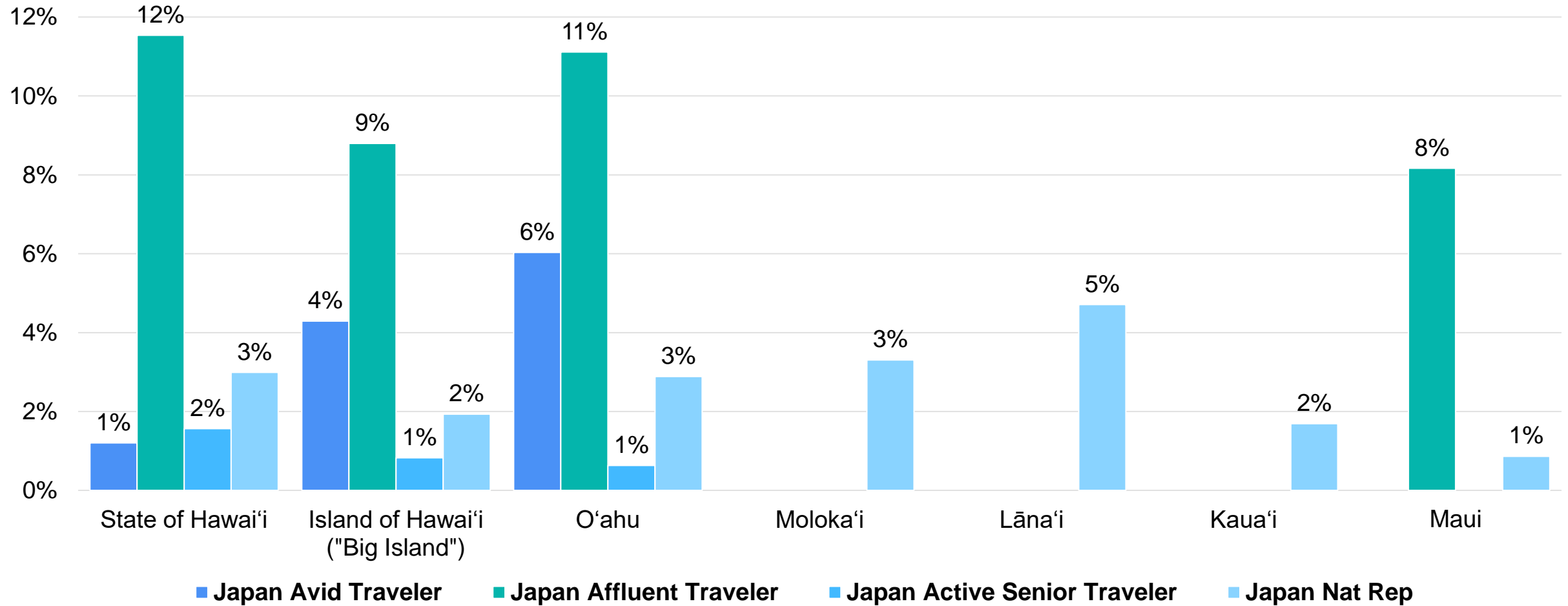
Affluent Traveler

- 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

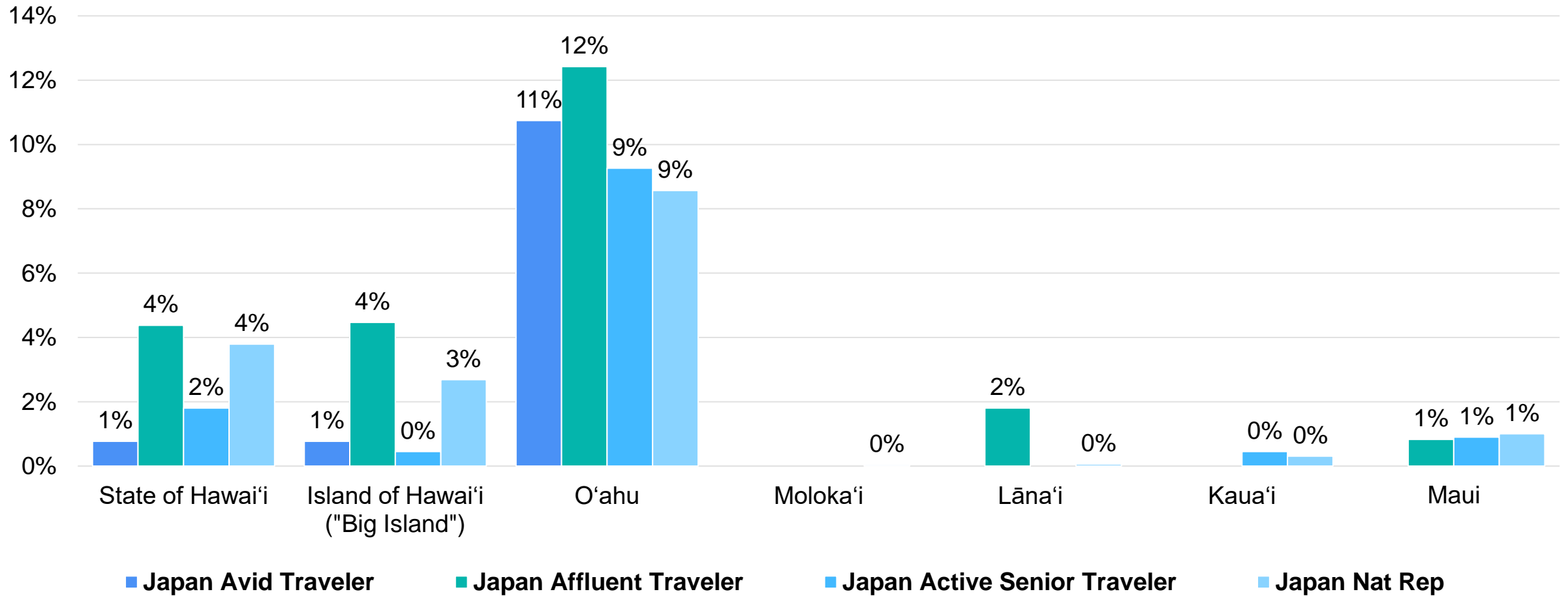
- Gross household income is greater than 1.95M+ yen
- Age is 65-75
- Belongs to a frequent flyer program
- Becomes aware of travel destinations on TV, radio, or newspaper

Japan - Leisure Trip in Past 12 Months



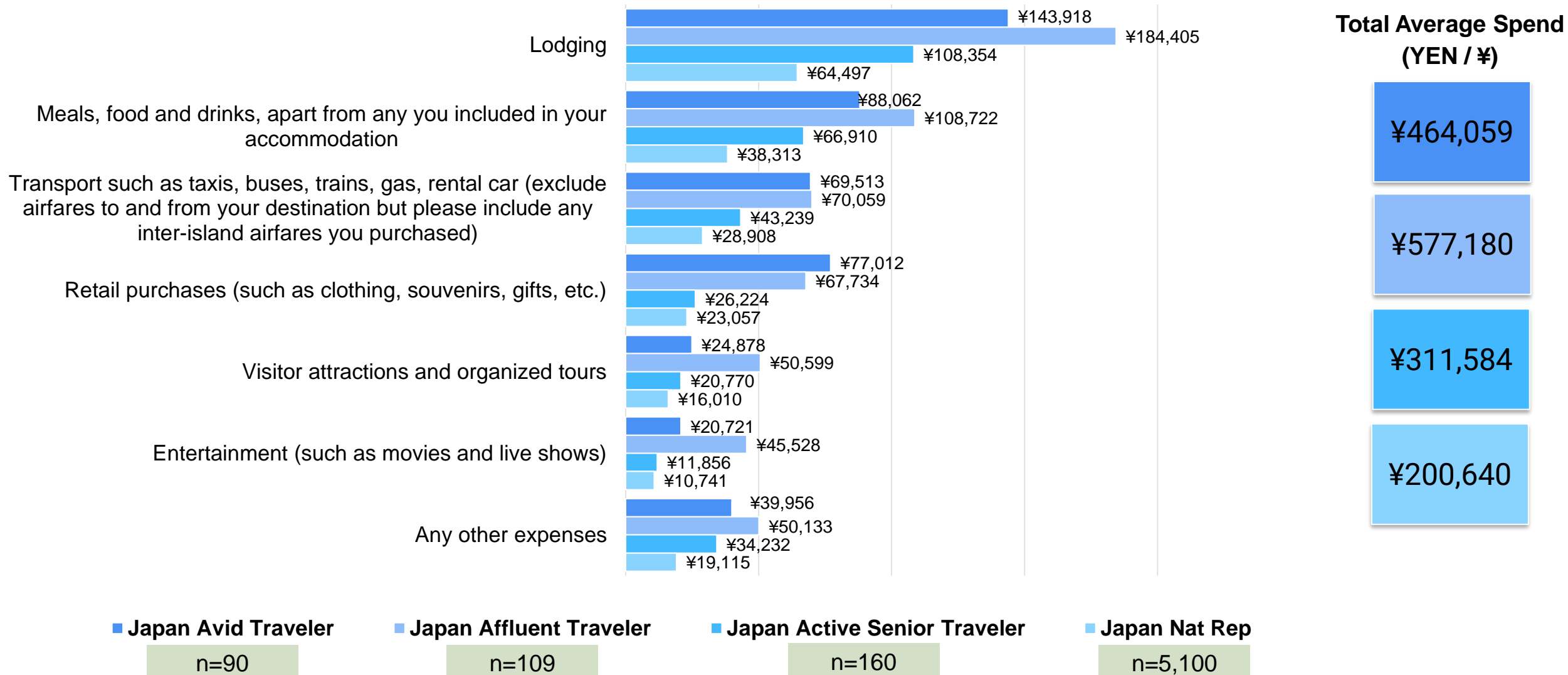
Sample Min. n=50

Japan - Next Destination for Leisure Trip



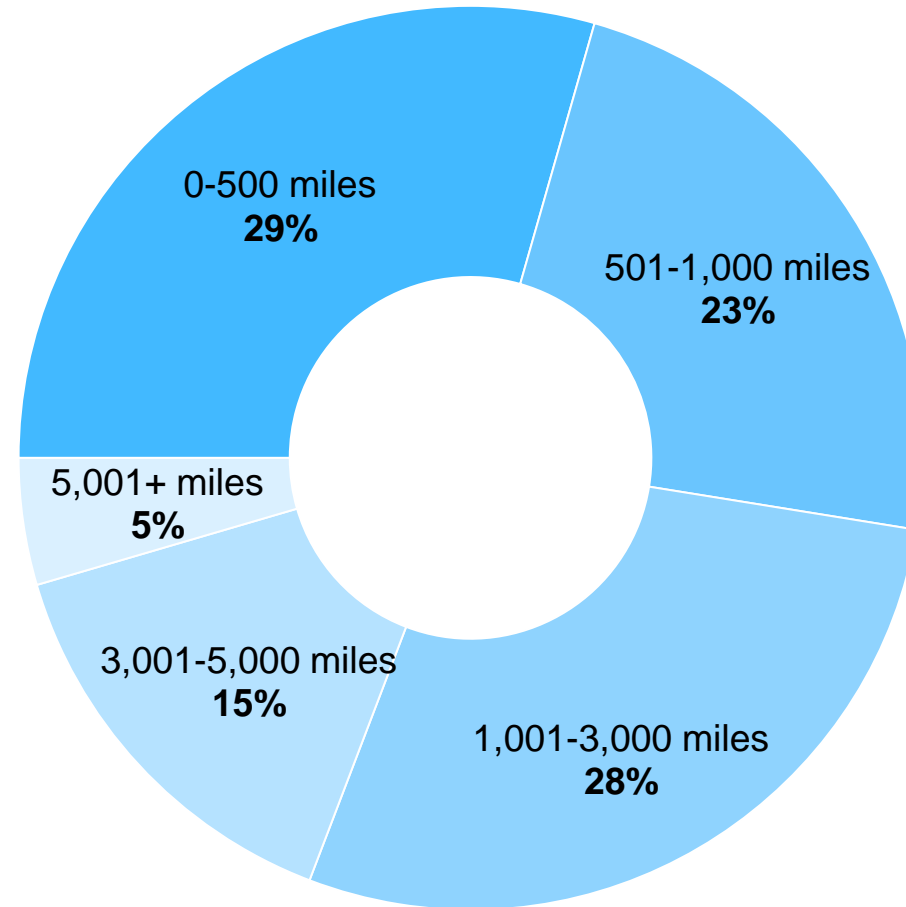
Sample Min. n=50

Japan - Total Annual Holiday Spend



Japan Avid Travelers: Annual Vacation

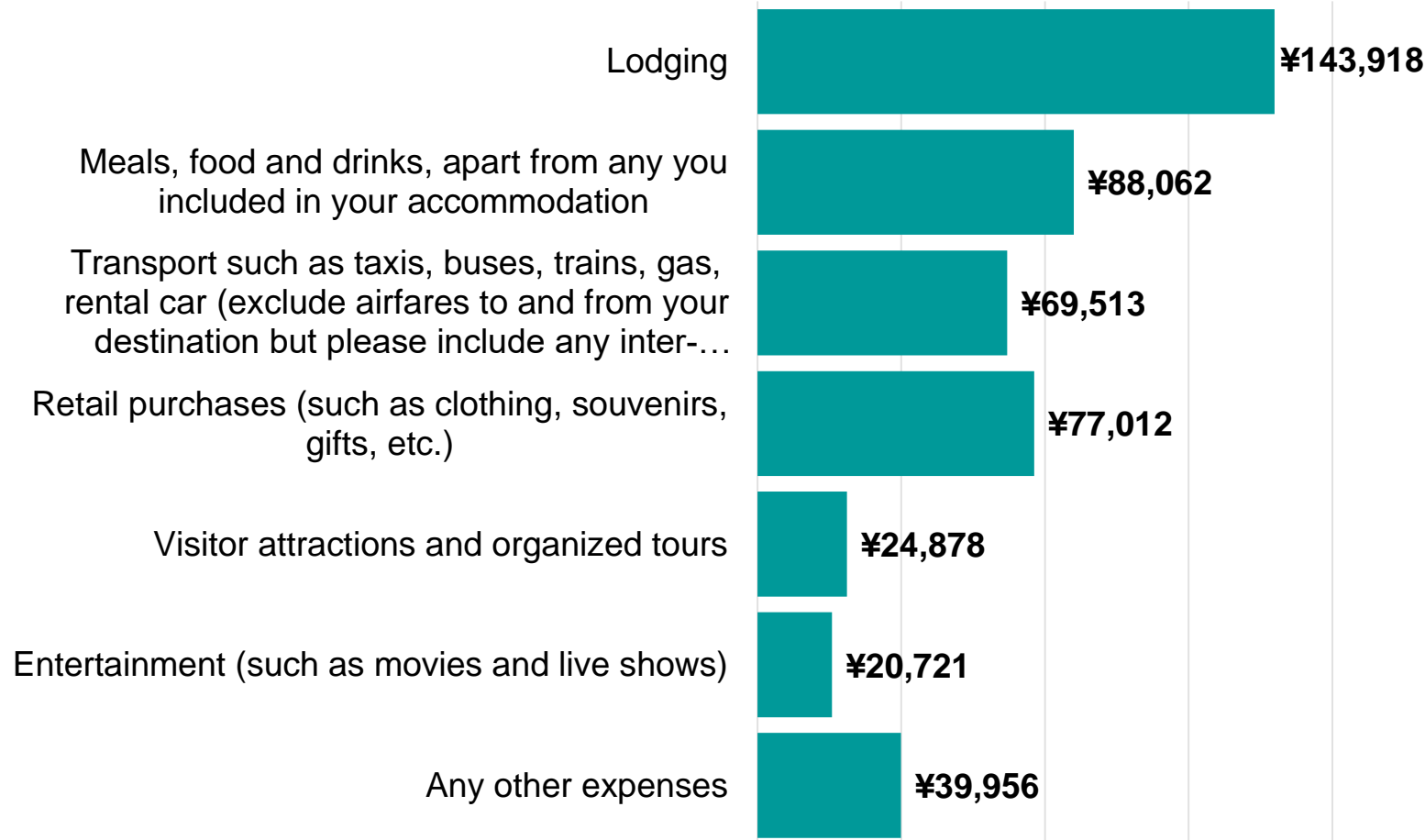
Distance Travelled on Annual Vacation



Sample Size: n=90

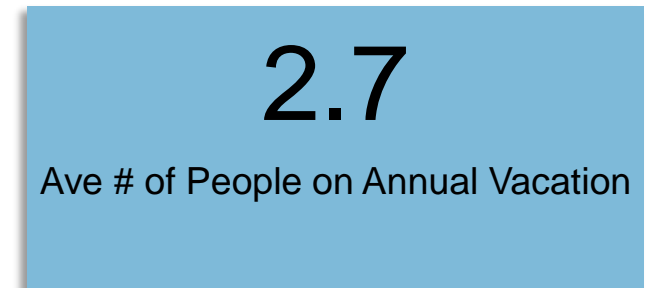
Japan Avid Travelers: Annual Vacation

Average Spend



Sample Size: n=90

Spend Per Person Per Day

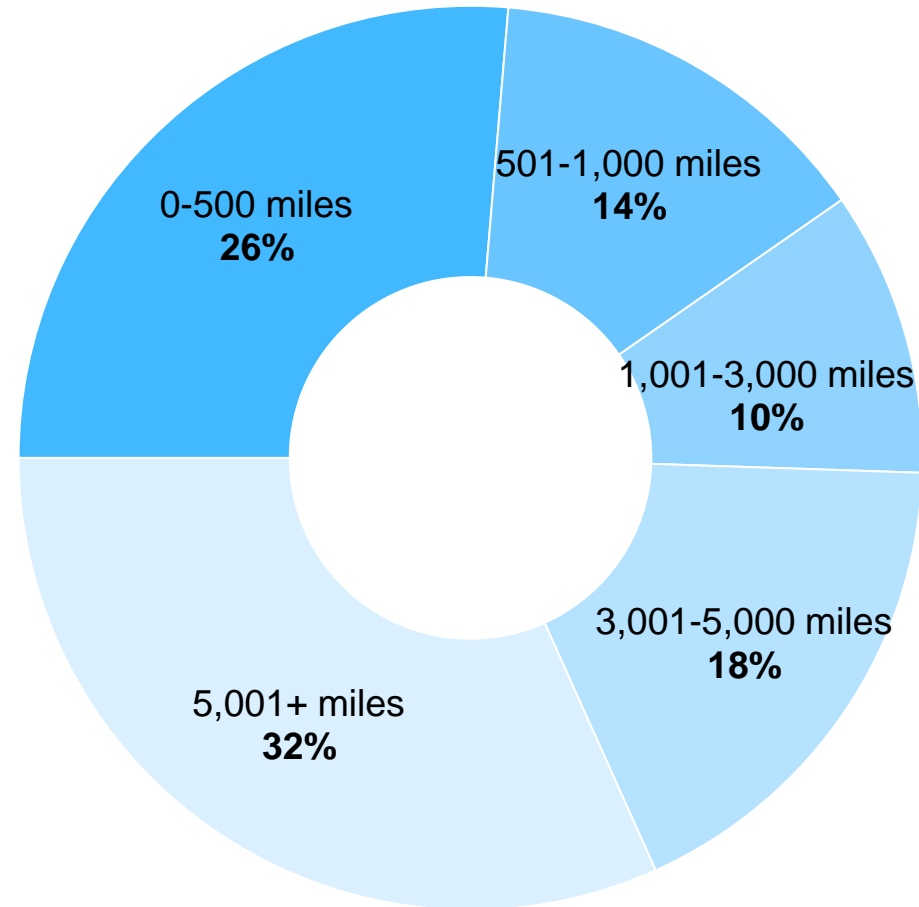


¥41,747

Ave. Per Person Per Day Spend

Japan Affluent Travelers: Annual Vacation

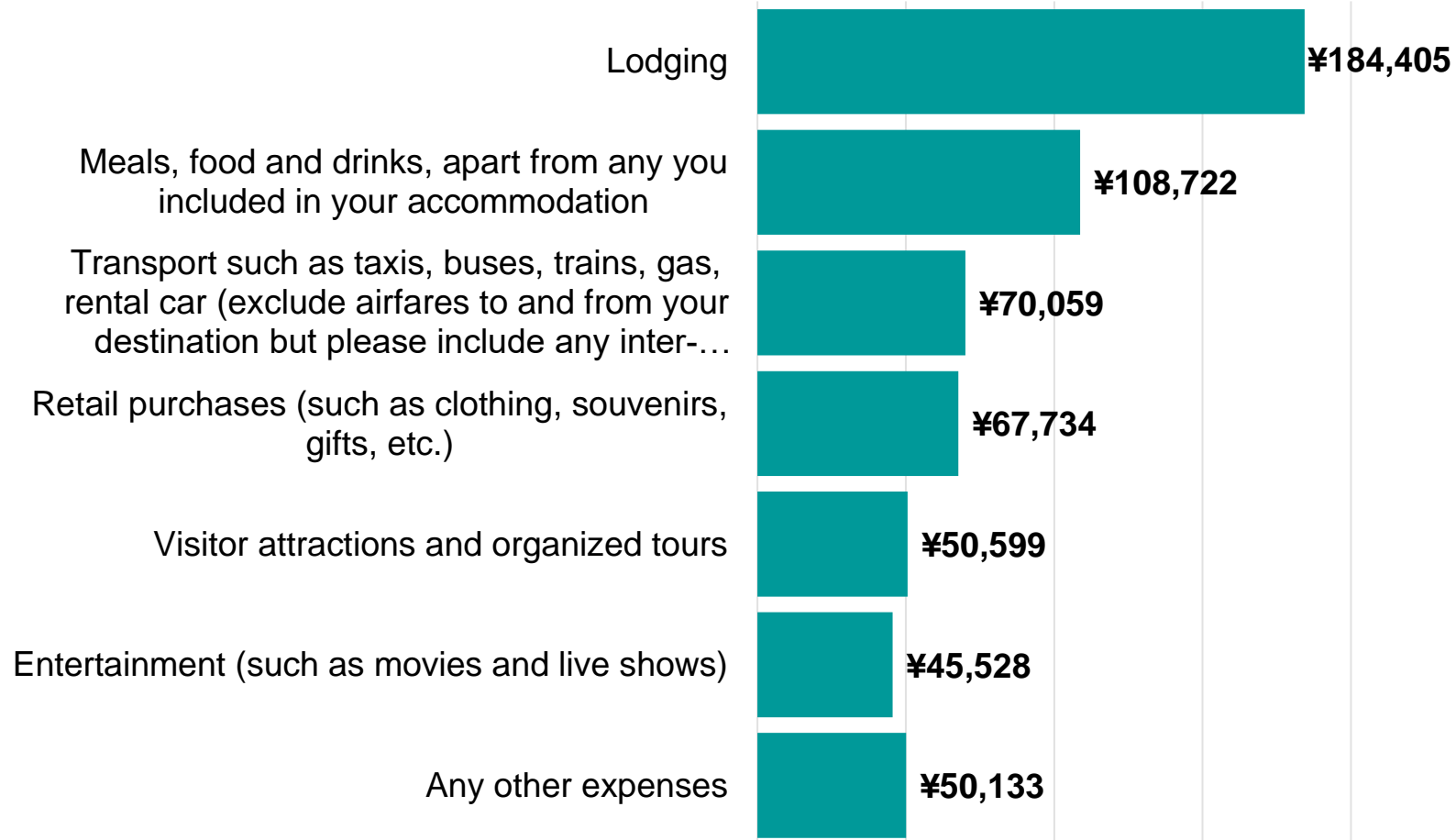
Distance Travelled on Annual Vacation



Sample Size: n=109

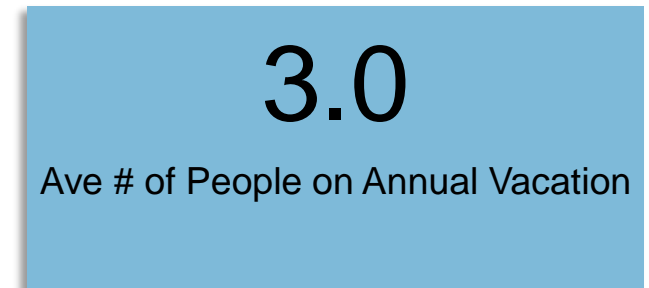
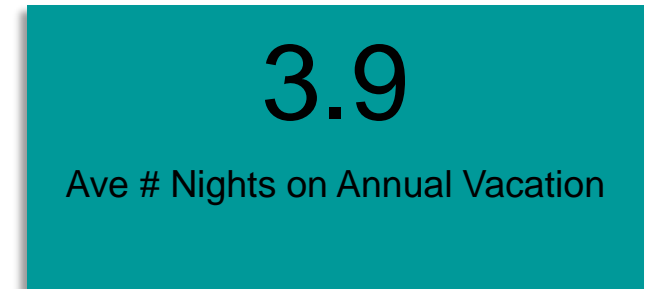
Japan Affluent Travelers: Annual Vacation

Average Spend



Sample Size: n=109

Spend Per Person Per Day

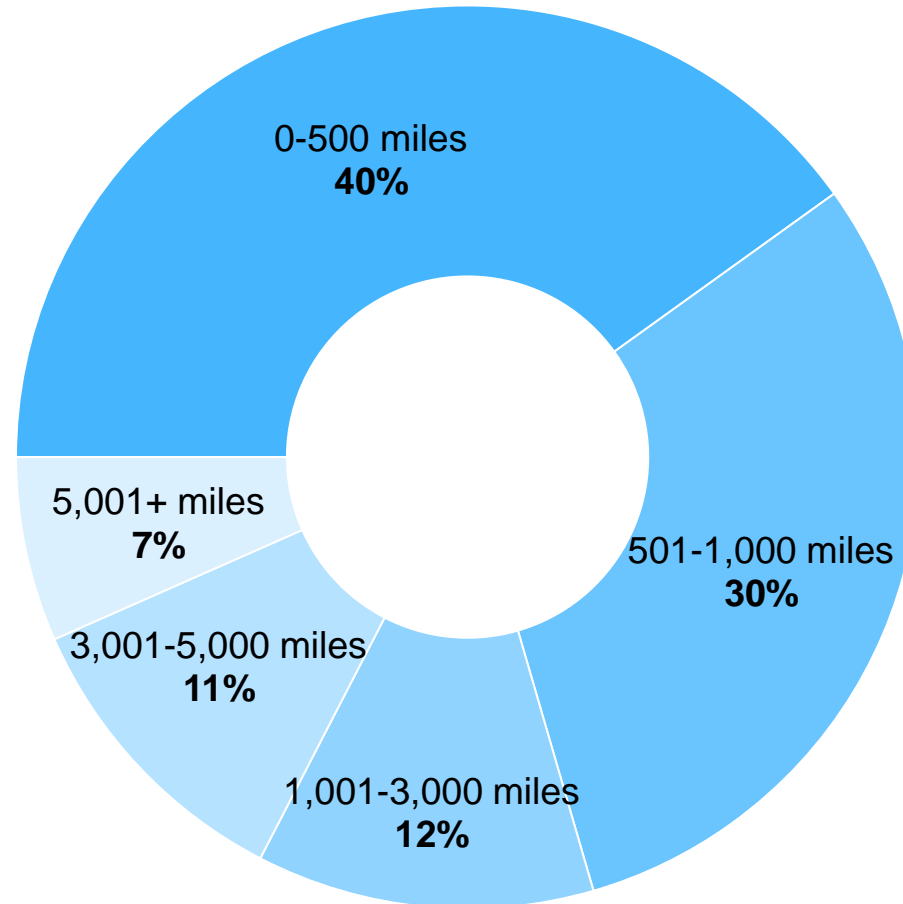


¥49,315

Ave. Per Person Per Day Spend

Japan Active Senior Travelers: Annual Vacation

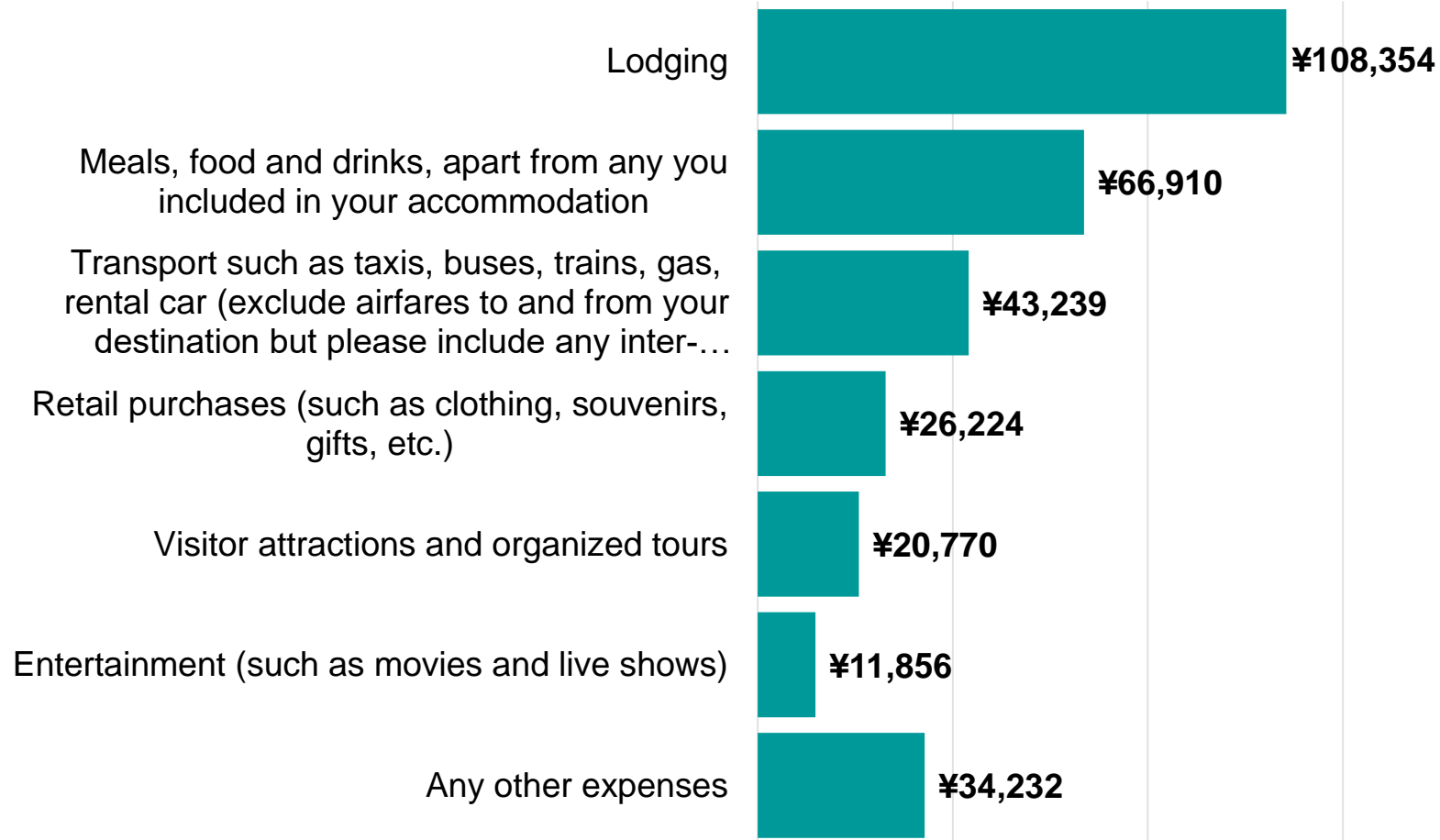
Distance Travelled on Annual Vacation



Sample Size: n=160

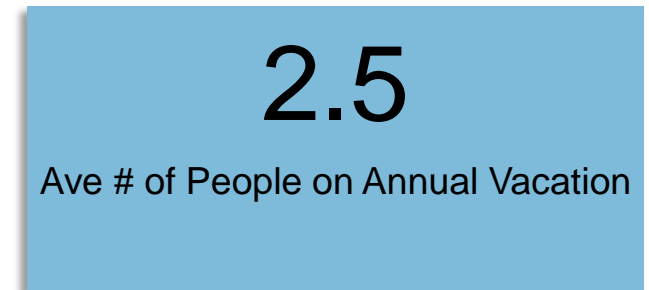
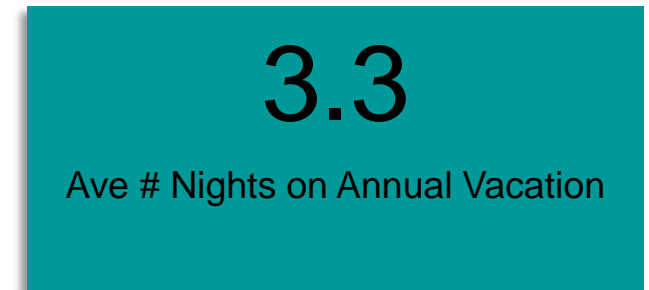
Japan Active Senior Travelers: Annual Vacation

Average Spend



Sample Size: n=160

Spend Per Person Per Day

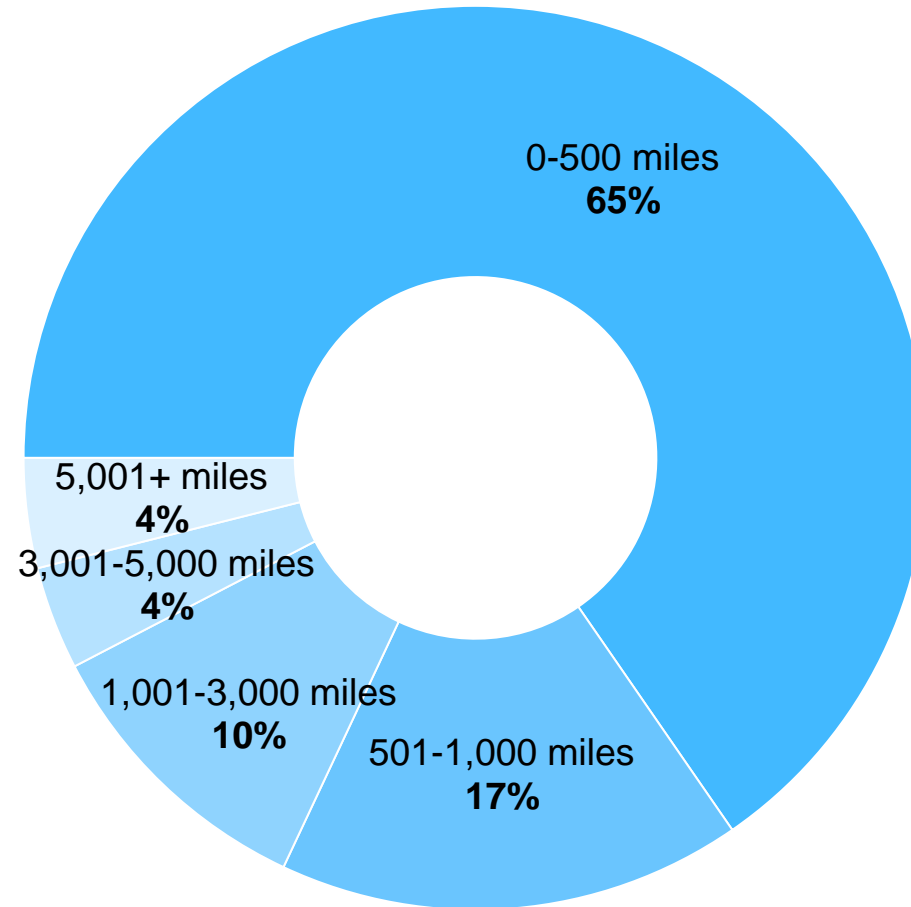


¥38,454

Ave. Per Person Per Day Spend

Japan Nat Rep: Annual Vacation

Distance Travelled on Annual Vacation



Sample Size: n=5,100

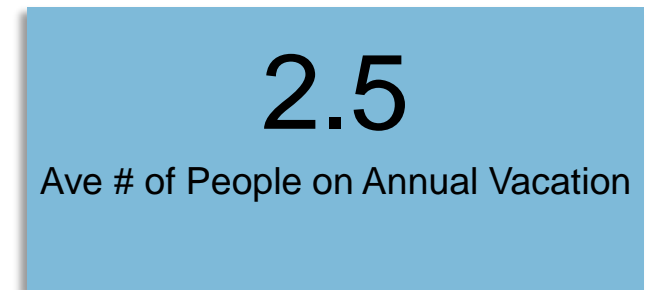
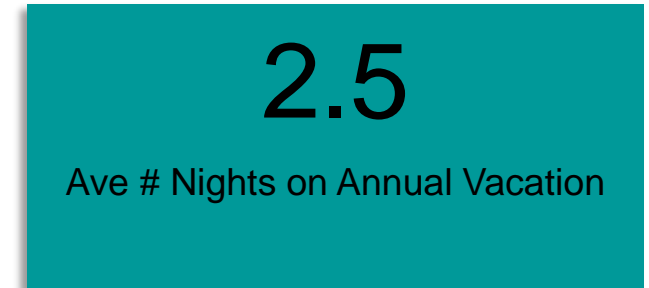
Japan Nat Rep: Annual Vacation

Average Spend



Sample Size: n=5,100

Spend Per Person Per Day



Japan - Importance of Travel Factors

	Very Important 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

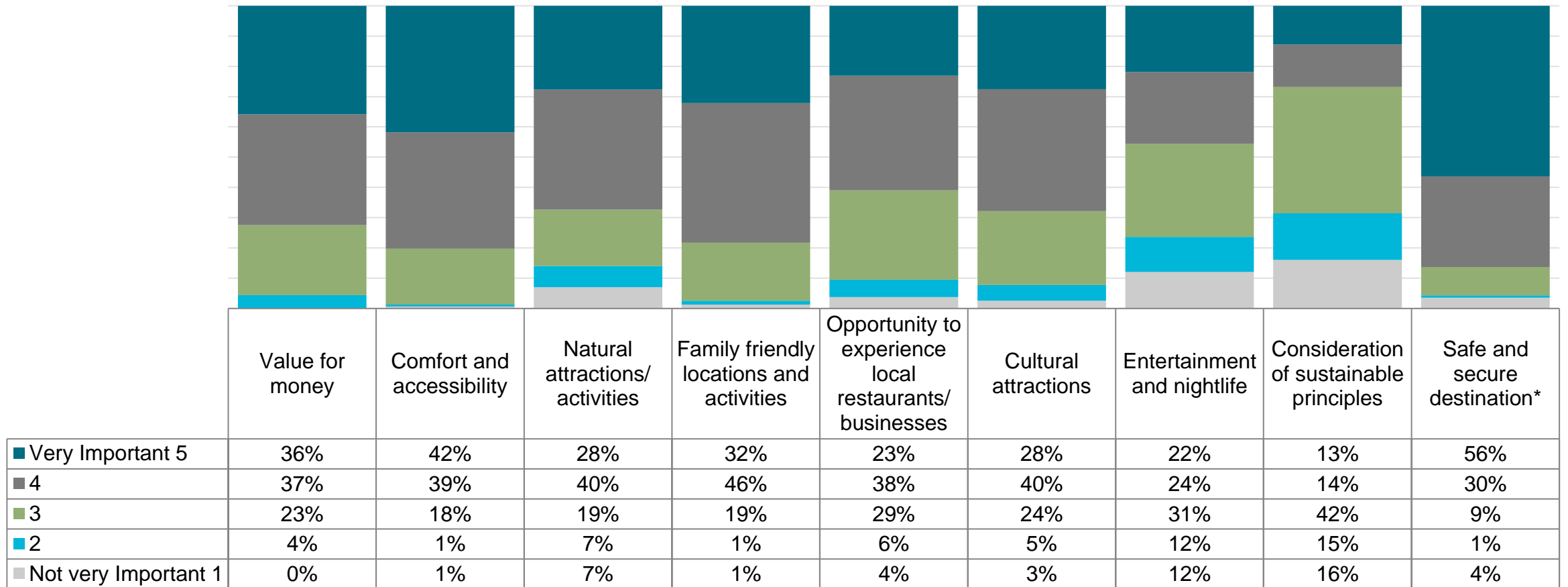
n=5,100

*n=4,284

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

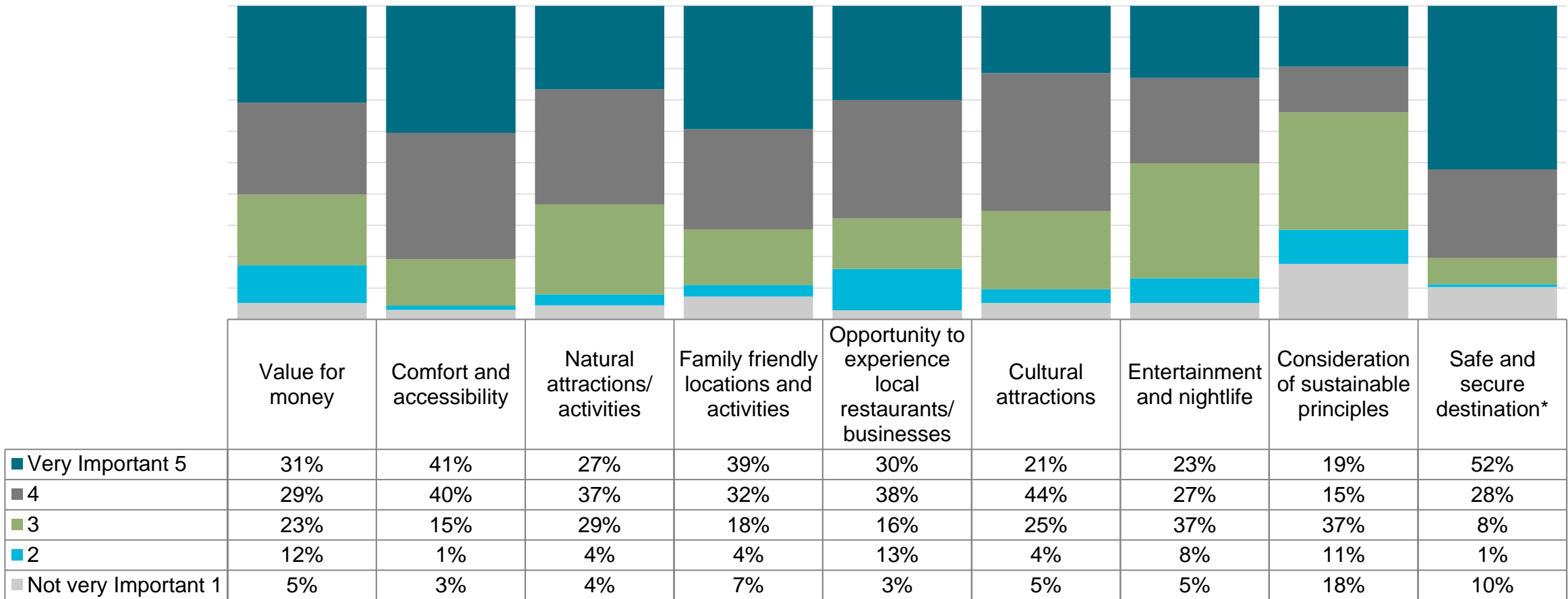


Not very Important 1
 2
 3
 4
 Very Important 5

Sample Size: n=90

*n=80

Japan Affluent Travelers: Importance of Travel Factors



Not very Important 1
 2
 3
 4
 Very Important 5

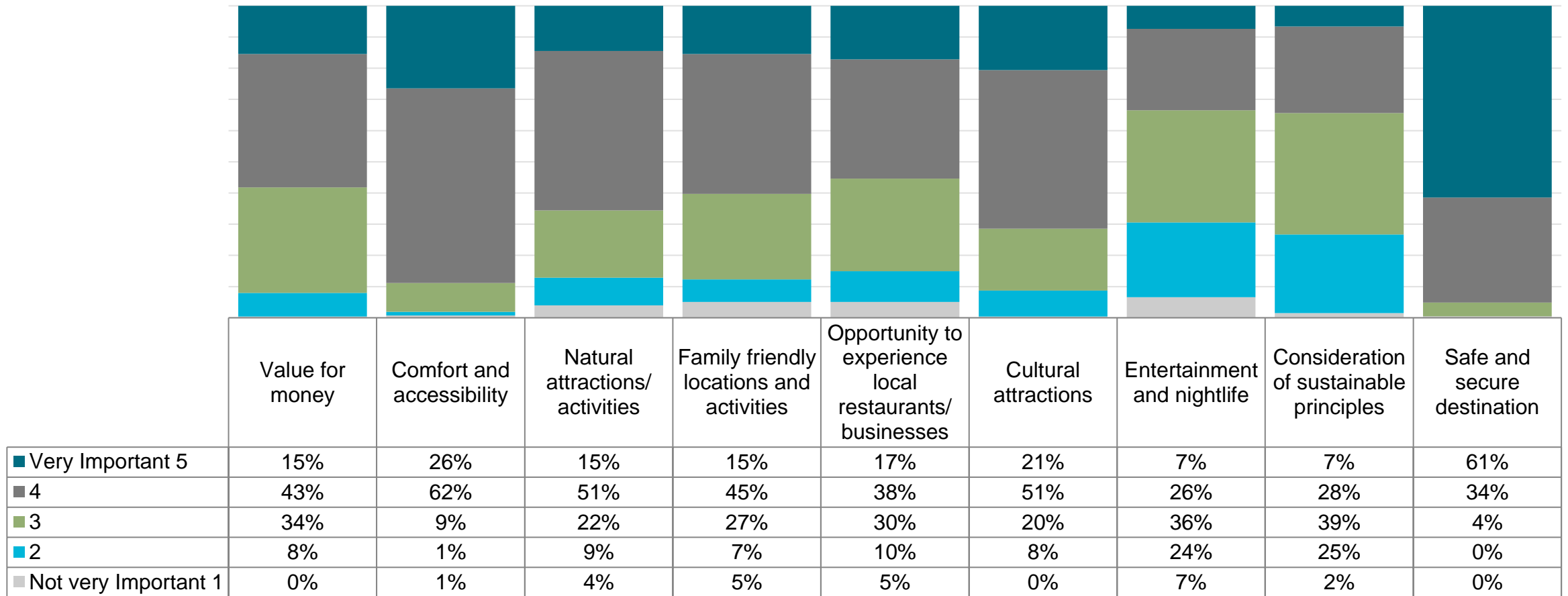
Sample Size: n=109

*n=90

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 | Which activities would you participate in if you take a trip to Hawaii?

*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 Active Senior Travelers: Importance of Travel Factors



Not very Important 1
 2
 3
 4
 Very Important 5

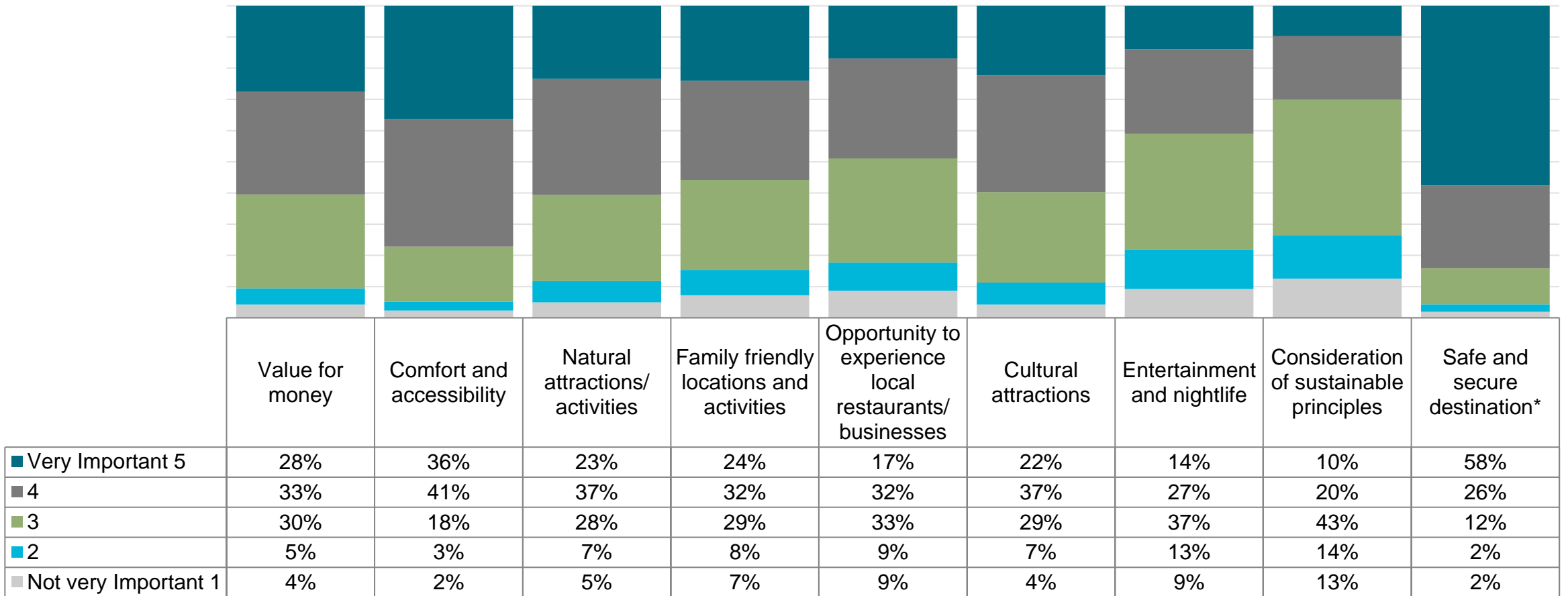
Sample Size: n=160

*n=132

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 | Which activities would you participate in if you take a trip to Hawaii?*

*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 Nat Rep: Importance of Travel Factors



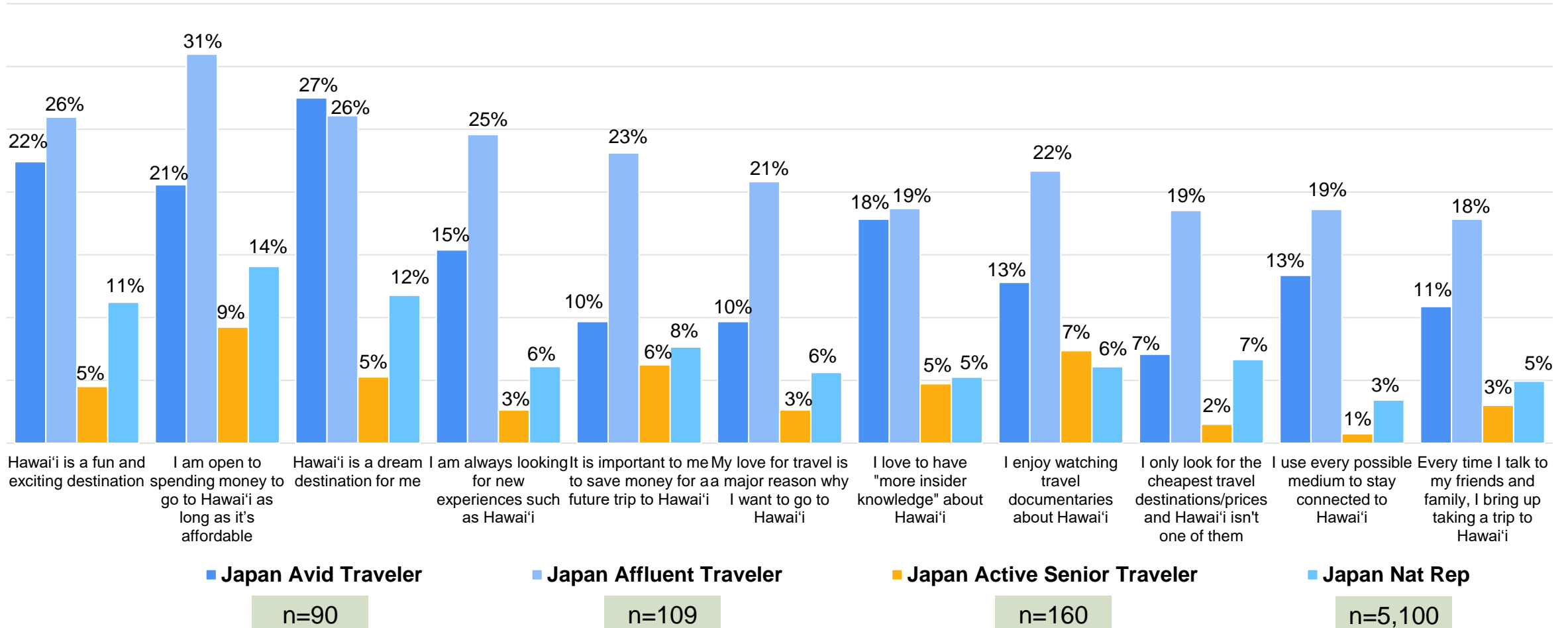
■ Not very Important 1
 ■ 2
 ■ 3
 ■ 4
 ■ Very Important 5

Sample Size: n=5,100

*n=4,284

Japan - Hawai'i as an Aspirational Destination

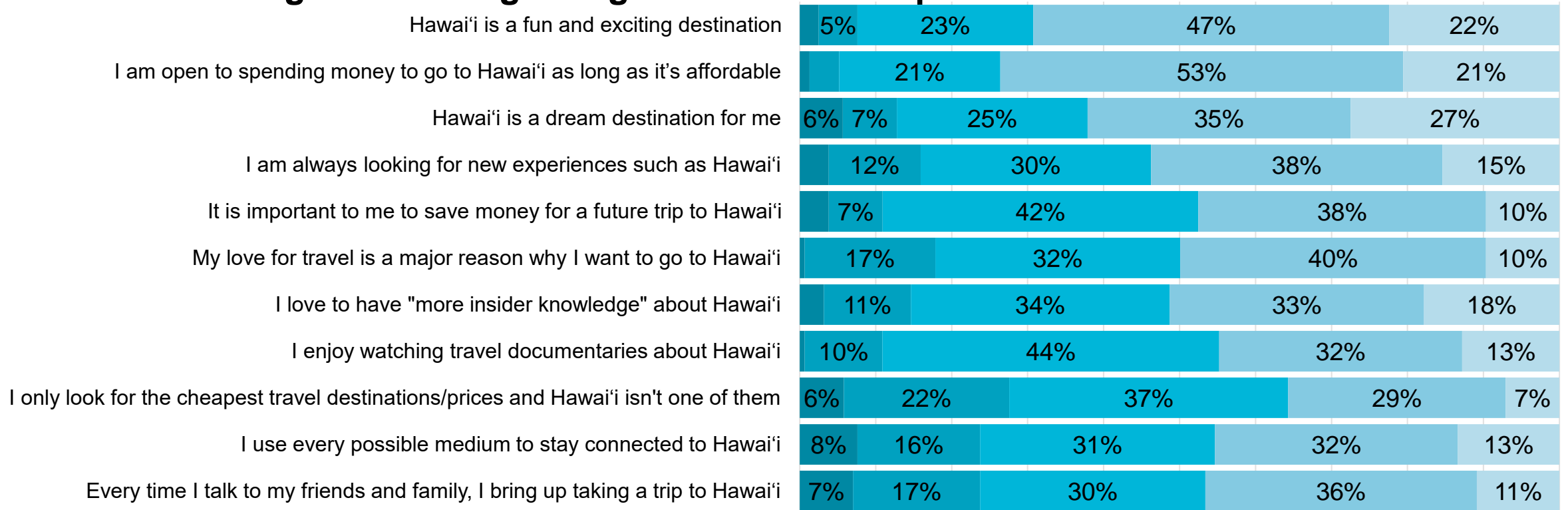
Agreement Regarding Hawai'i as a Travel Destination (Strongly Agree)



Please tell us how much you agree or disagree with each statement below about Hawai'i as a travel destination to you?

Japan Avid Travelers: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

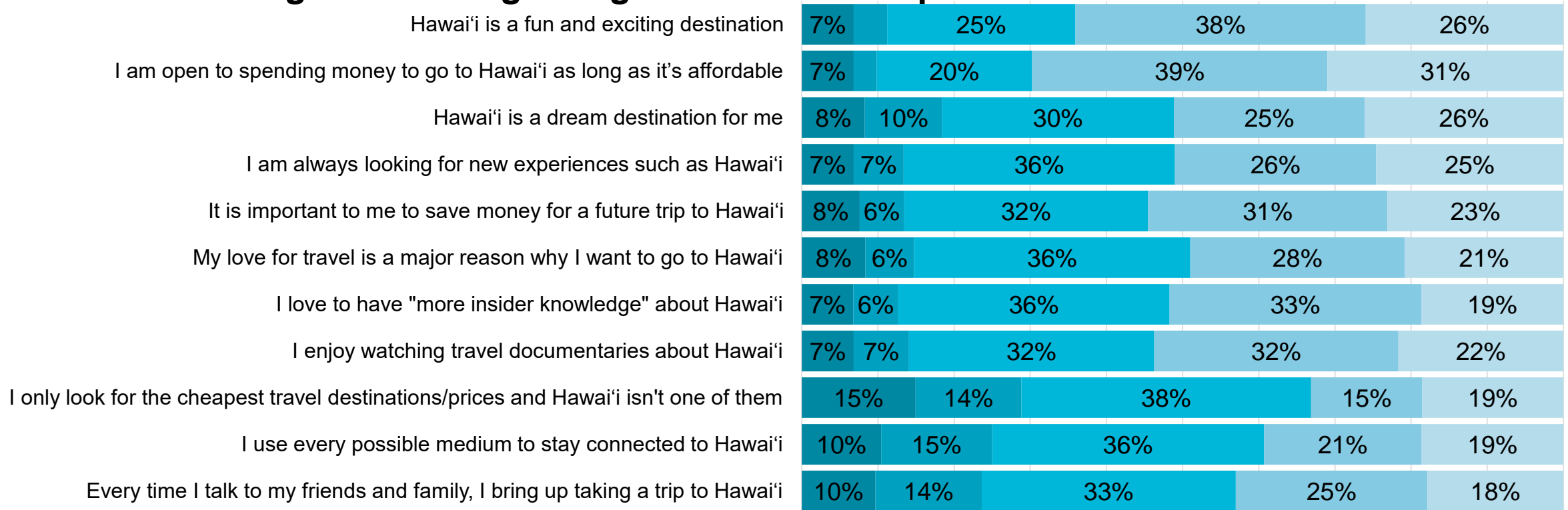


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=90

Japan Affluent Travelers: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

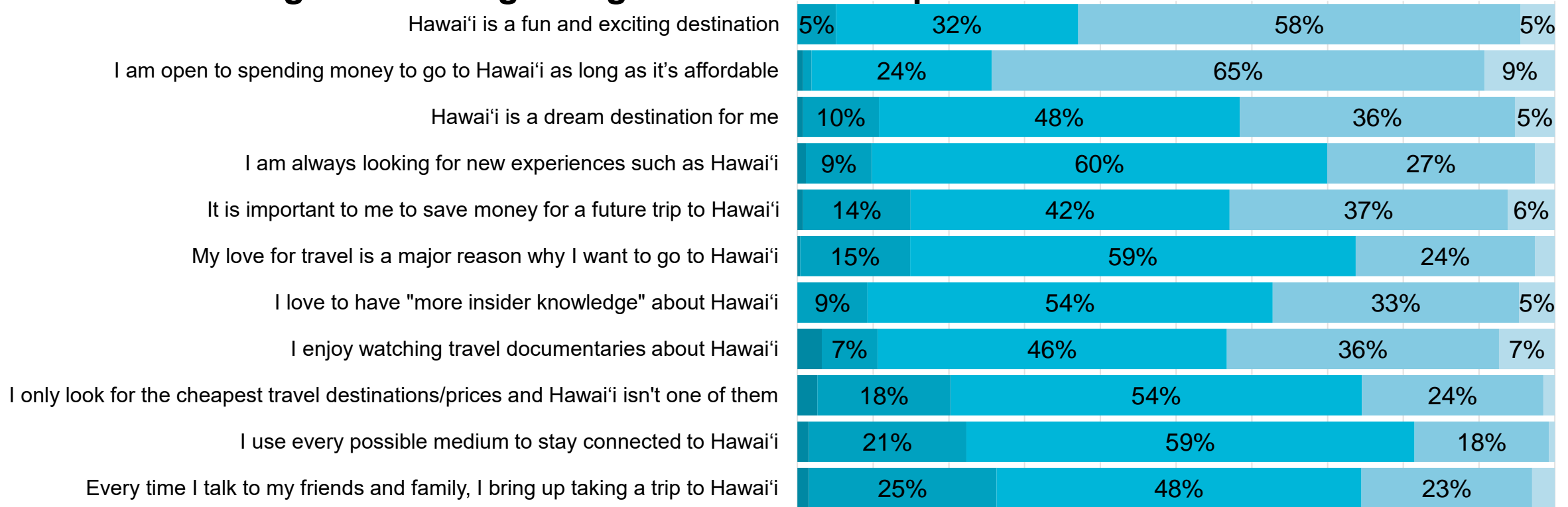


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=109

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

Agreement Regarding Hawai'i as an Aspirational Destination

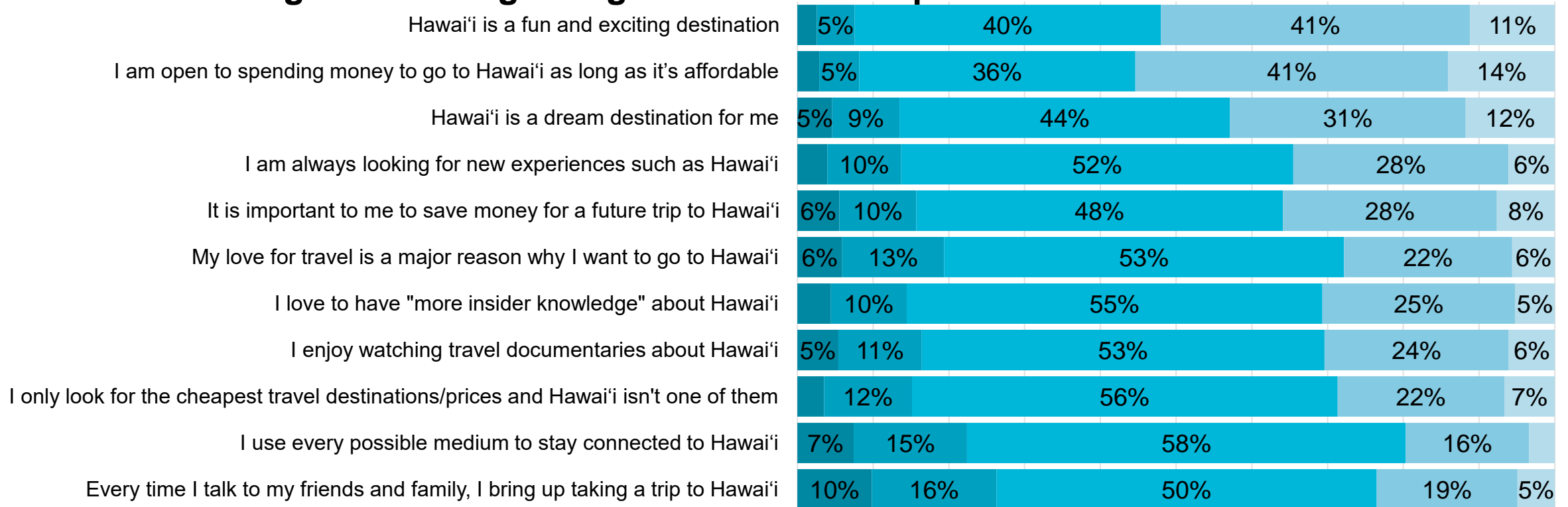


■ Strongly disagree
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 ■ Neither agree nor disagree
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Sample Size: n=160

Japan Nat Rep: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

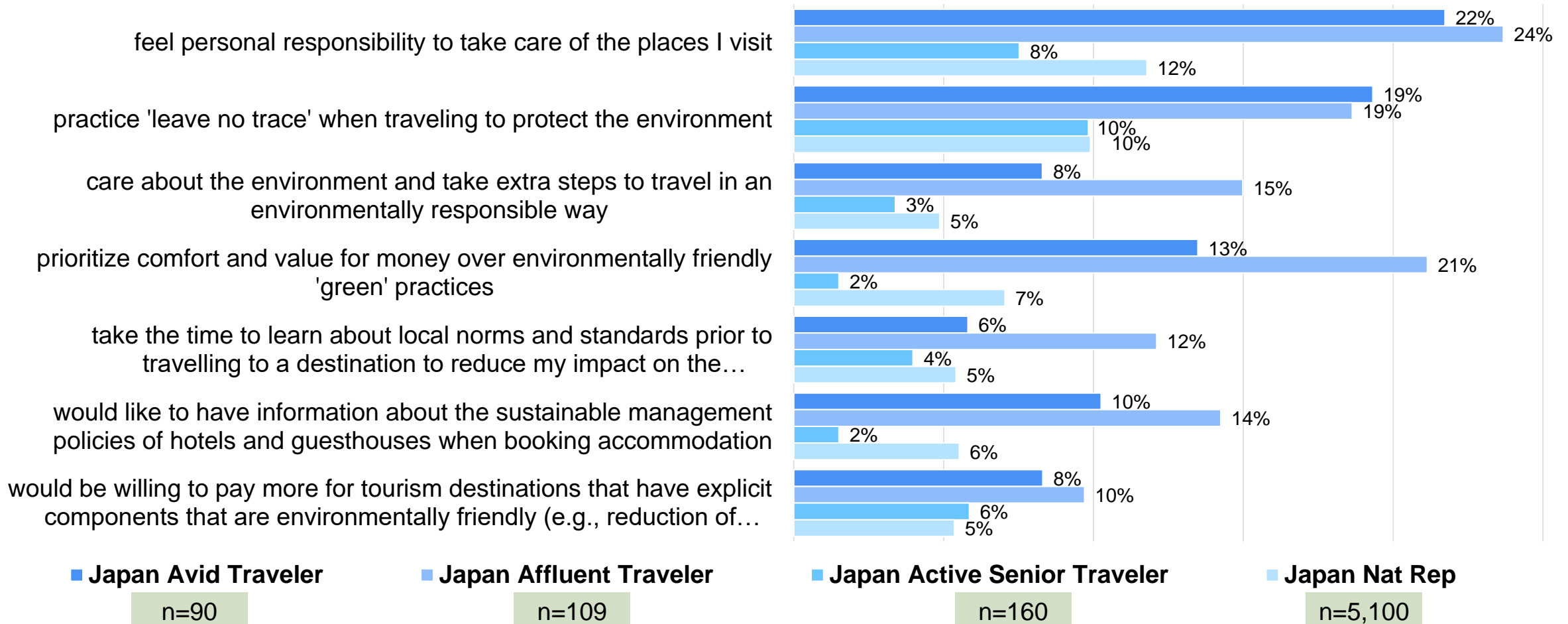


■ Strongly disagree
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Sample Size: n=5,100

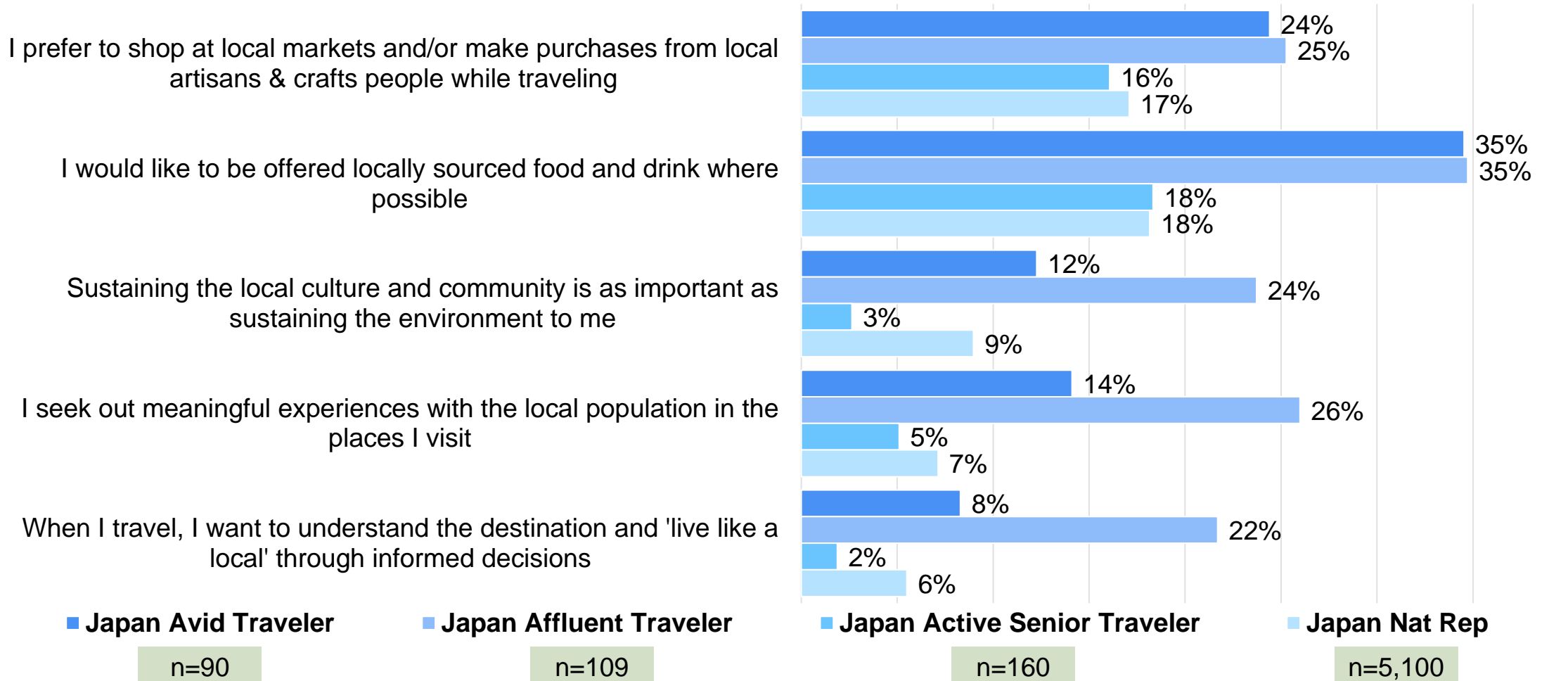
Japan - Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling (Strongly Agree)



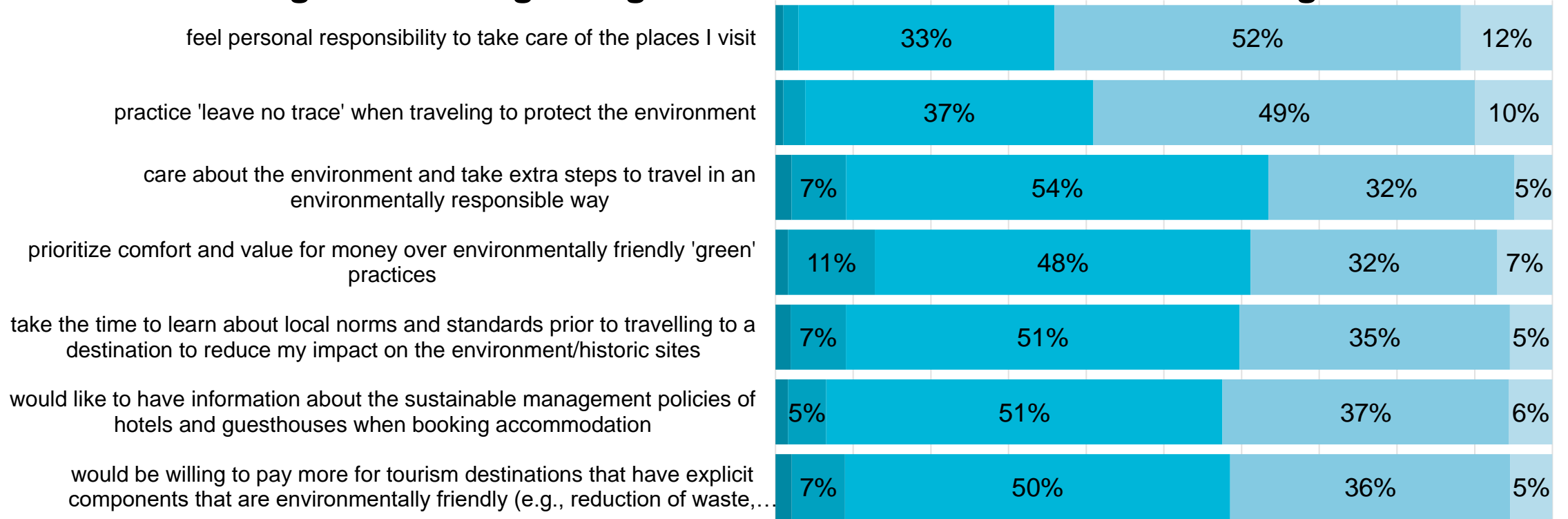
Japan - Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling (Strongly Agree)



Japan Avid Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

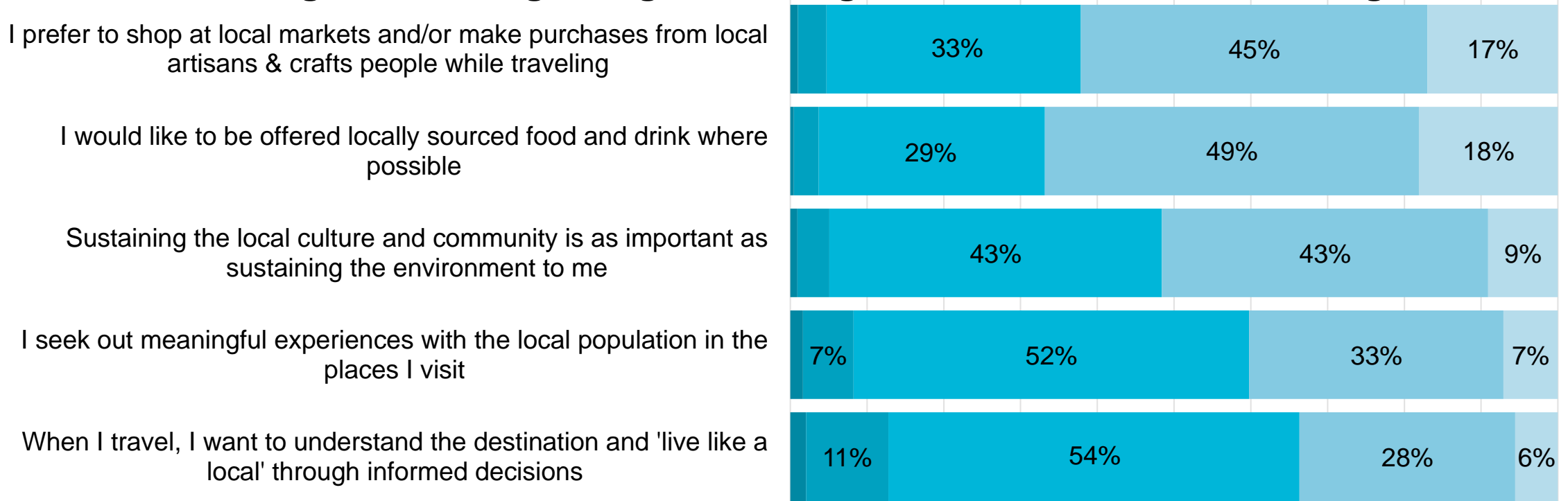


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=90

Japan Avid Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

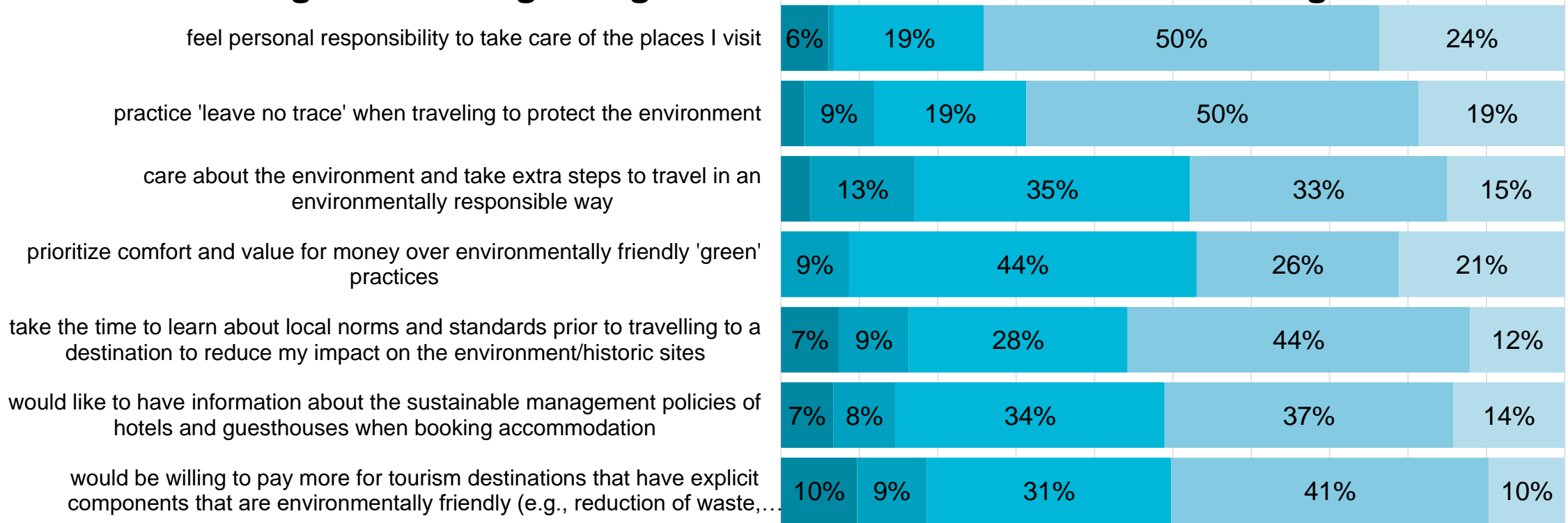


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=90

Japan Affluent Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling



■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=109

Japan Affluent Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

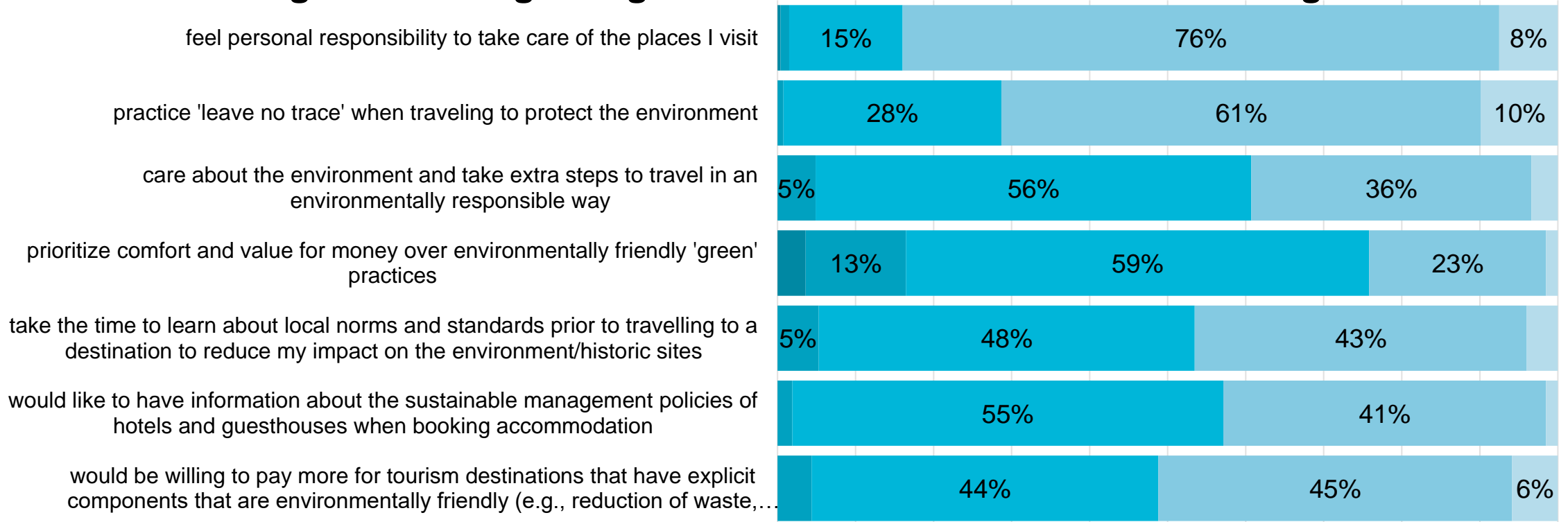


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Sample Size: n=109

Japan Active Senior Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

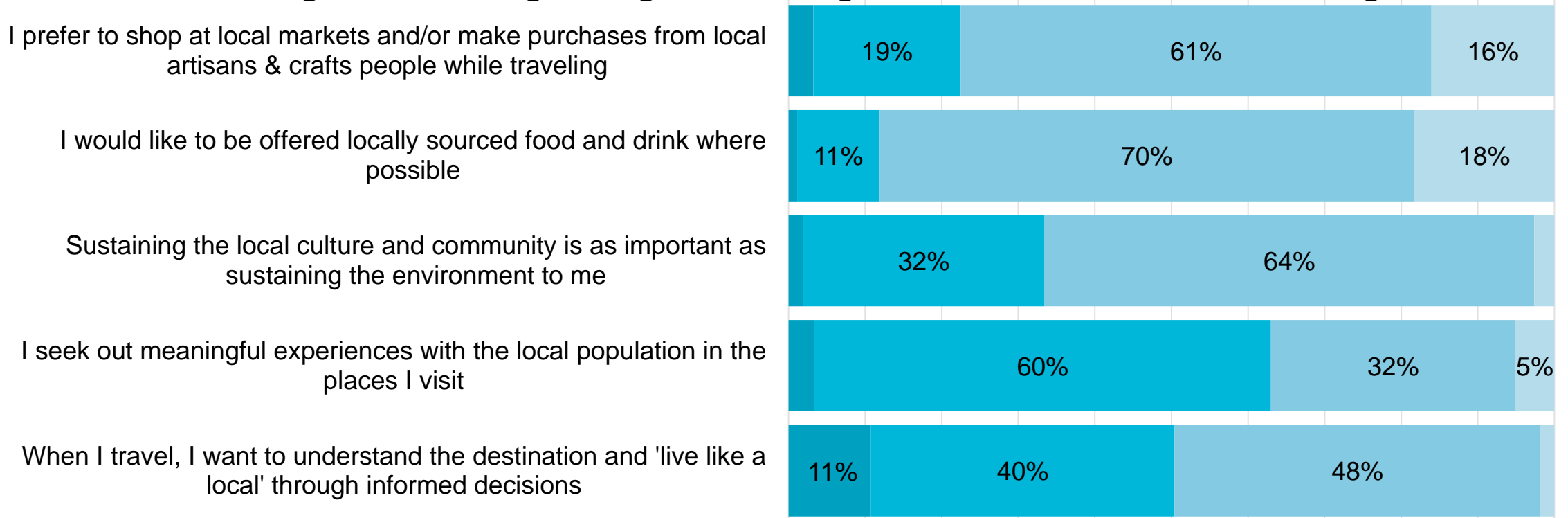


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
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Sample Size: n=160

Japan Active Senior Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

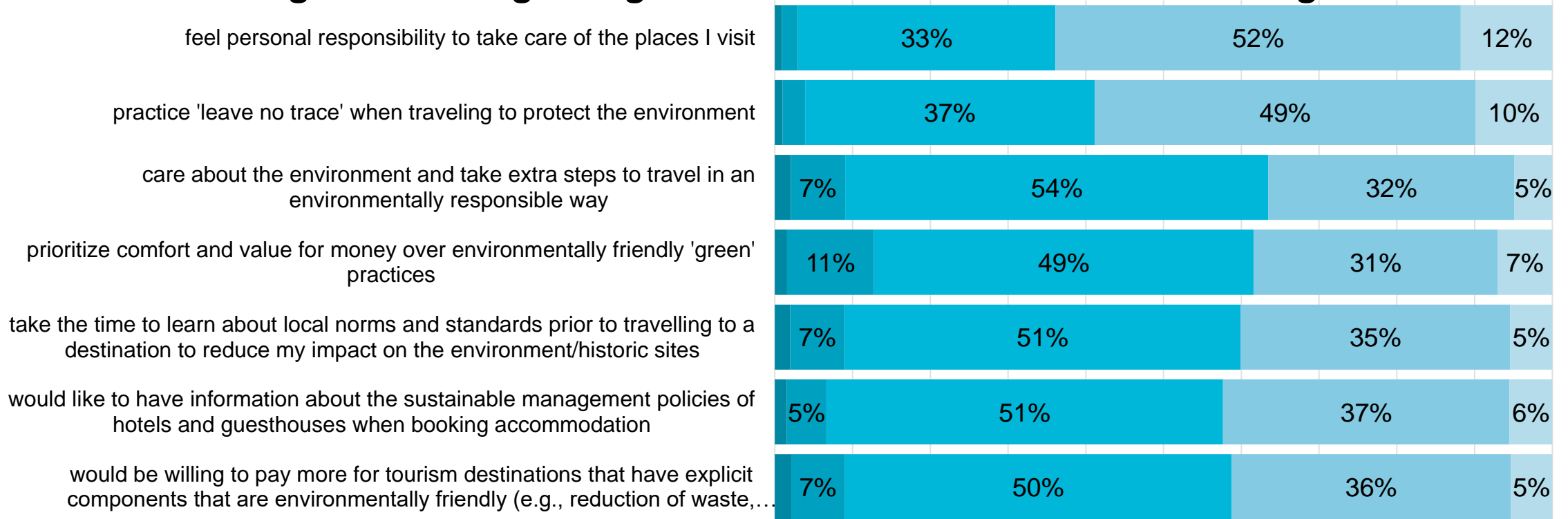


■ Strongly disagree
 ■ Disagree
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 ■ Agree
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Sample Size: n=160

Japan Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling



■ Strongly disagree
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 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=5,100

Japan Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

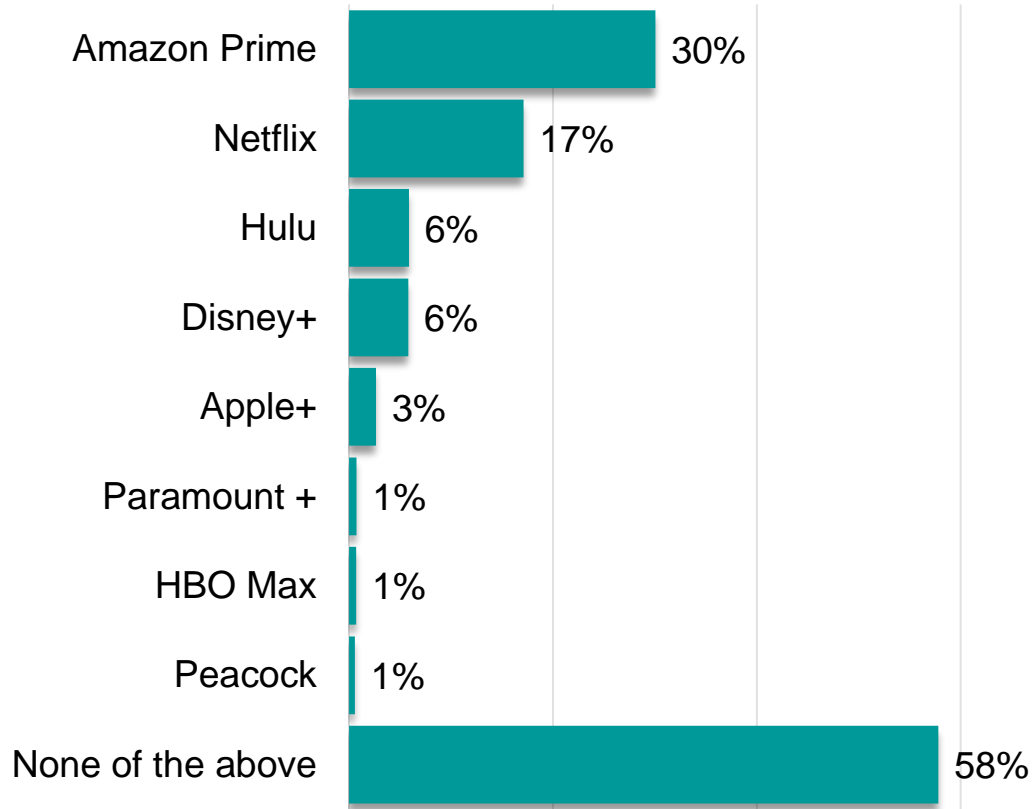


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

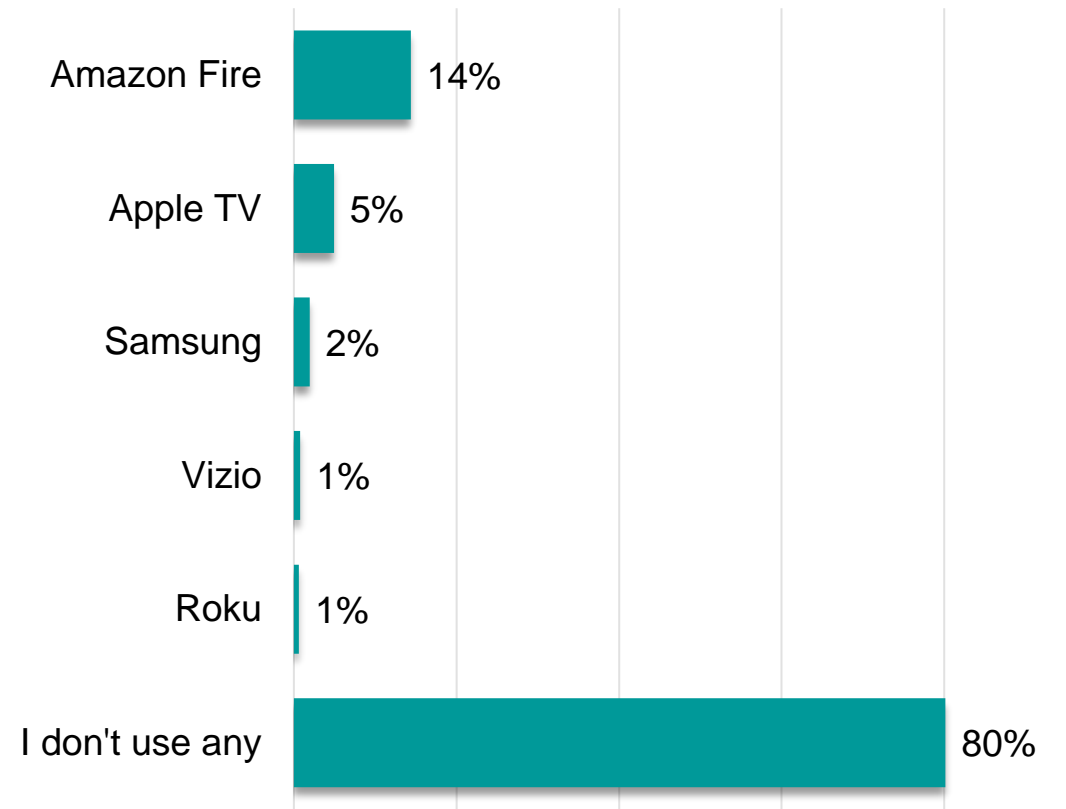
Sample Size: n=5,100

Japan Media Consumption

Streaming Platforms Used Weekly



Connected Device Used

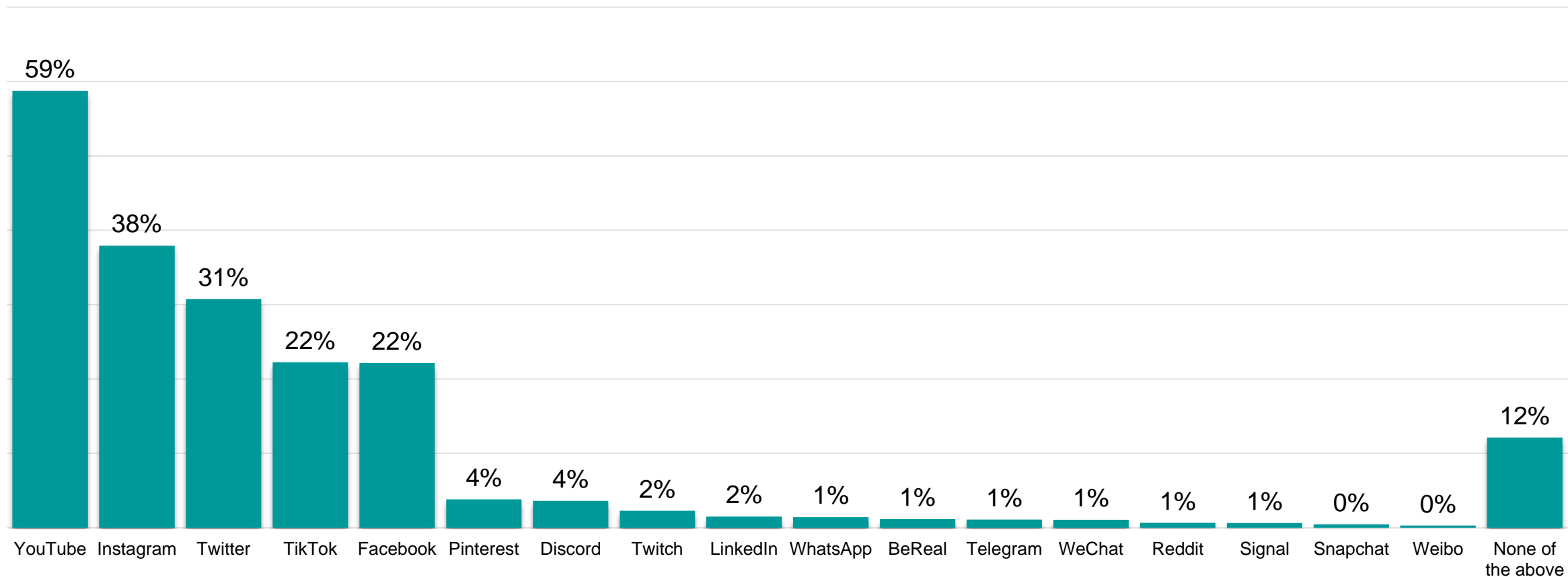


Sample Size: n=5,100

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**

Japan Media Consumption

Social Media Platforms Used Weekly



Sample Size: n=5,100

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**

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%
I 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%

Sample Size: n=5,100

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**