



Vision Insights Japan Traveler Profiles 2023

January 24, 2024

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
- For the Japan Profiles, the sample size of the Avid Traveler segment is very small so the breakdown of this segment for selected sections (e.g., annual vacation, importance of travel factors, Hawai'i as an aspirational destination, & sustainability and travel responsibility statements) are unavailable

Japan - Segment Definitions

Avid Traveler

- Gross household income is 10M+ yen
- Age is 25-35
- Married or living with partner
- No children under the age of 18
- Full time/part time employed
- 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

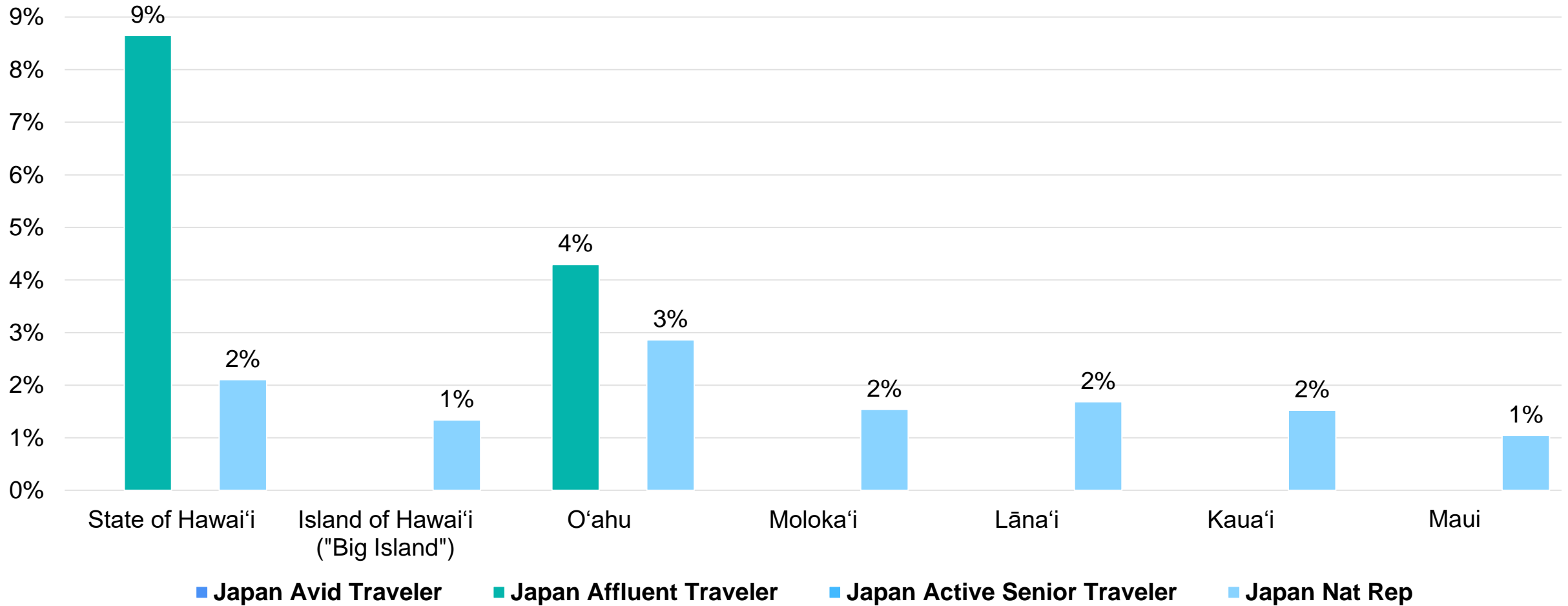
Affluent Traveler

- Gross household income is 20M+ yen
- Age is 35-50
- 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

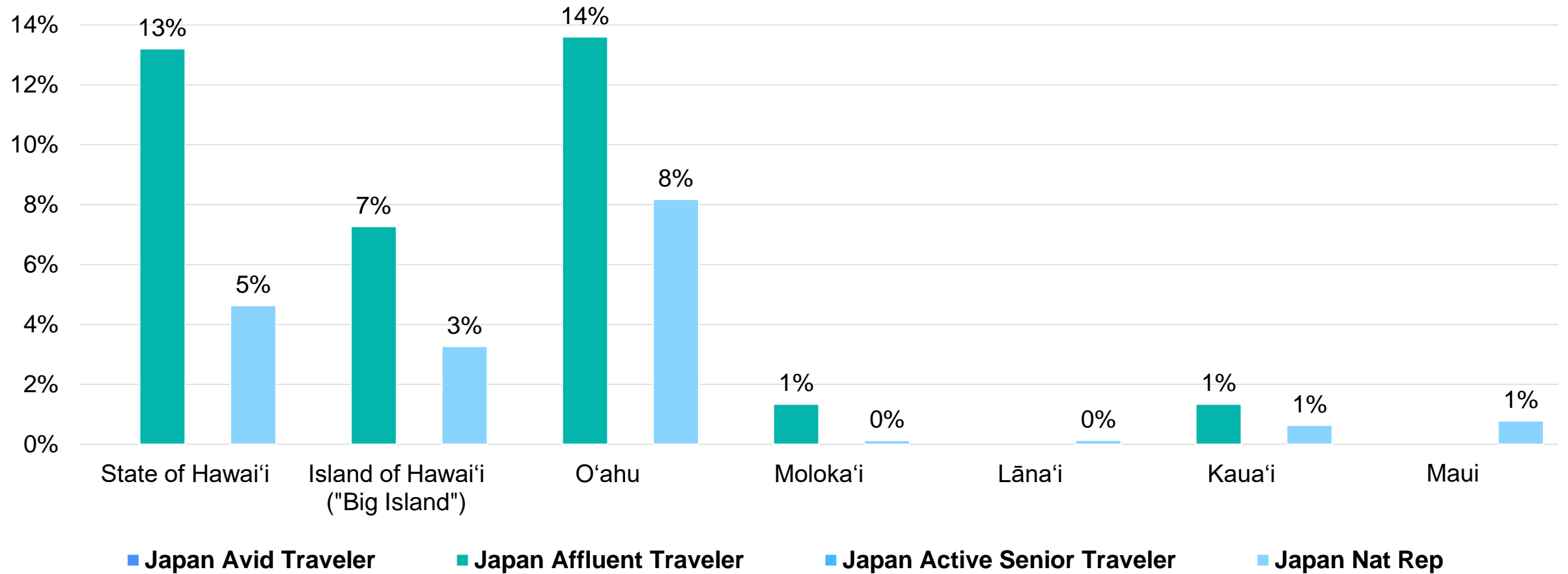
- Gross household income is greater than 1.95M+ yen
- Age is 60-75
- Books travel via a travel agent
- Belongs to a frequent flyer program
- Becomes aware of travel destinations on TV, radio, or newspaper

Japan - Leisure Trip in Past 12 Months



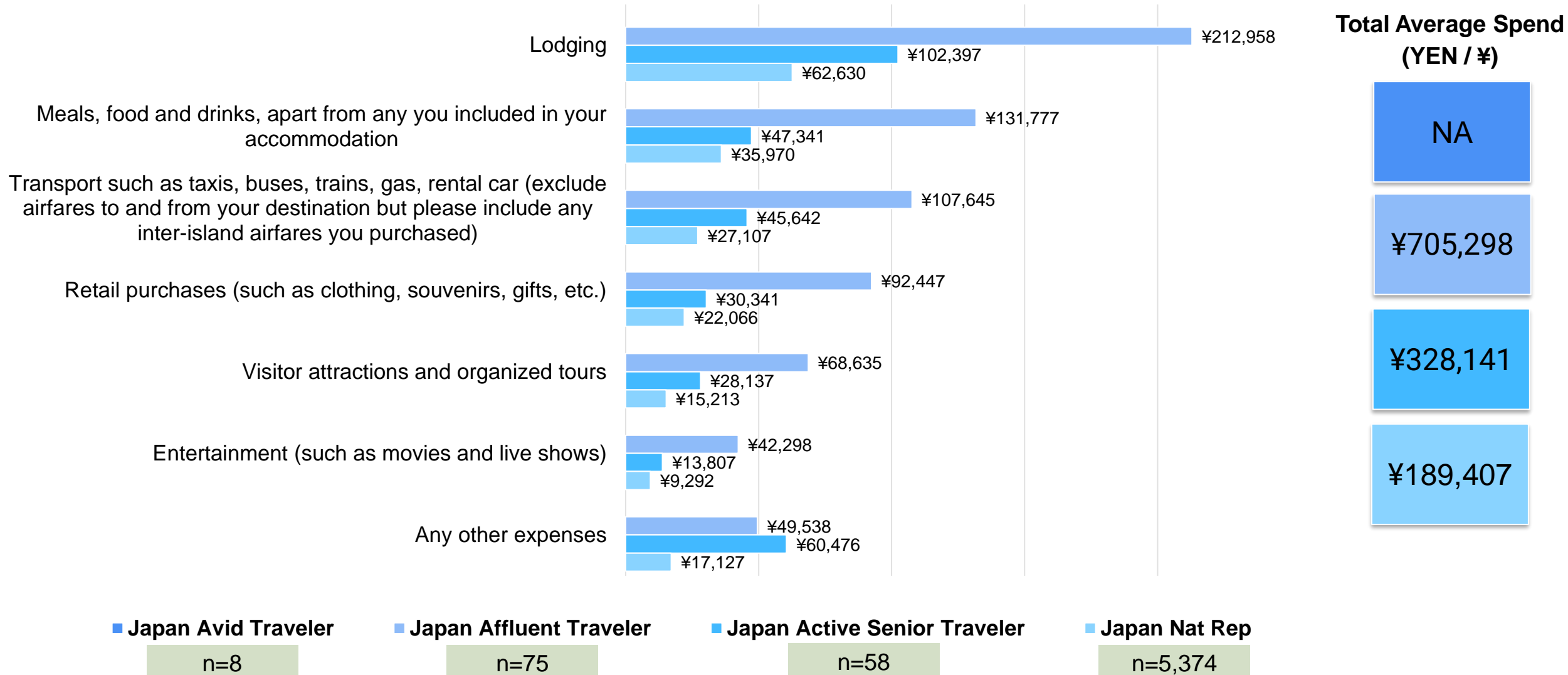
Sample Min. n=50

Japan - Next Destination for Leisure Trip



Sample Min. n=50

Japan - Total Annual Holiday Spend



Total Average Spend (YEN / ¥)

NA

¥705,298

¥328,141

¥189,407

■ Japan Avid Traveler

n=8

■ Japan Affluent Traveler

n=75

■ Japan Active Senior Traveler

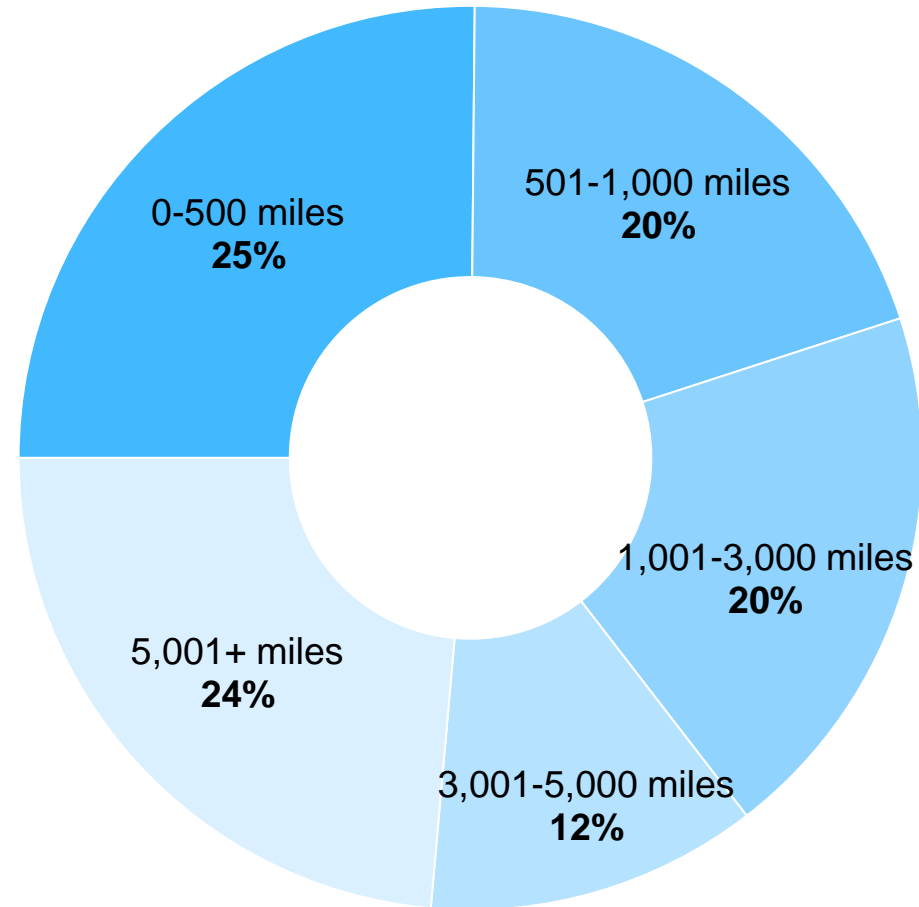
n=58

■ Japan Nat Rep

n=5,374

Japan Affluent Travelers: Annual Vacation

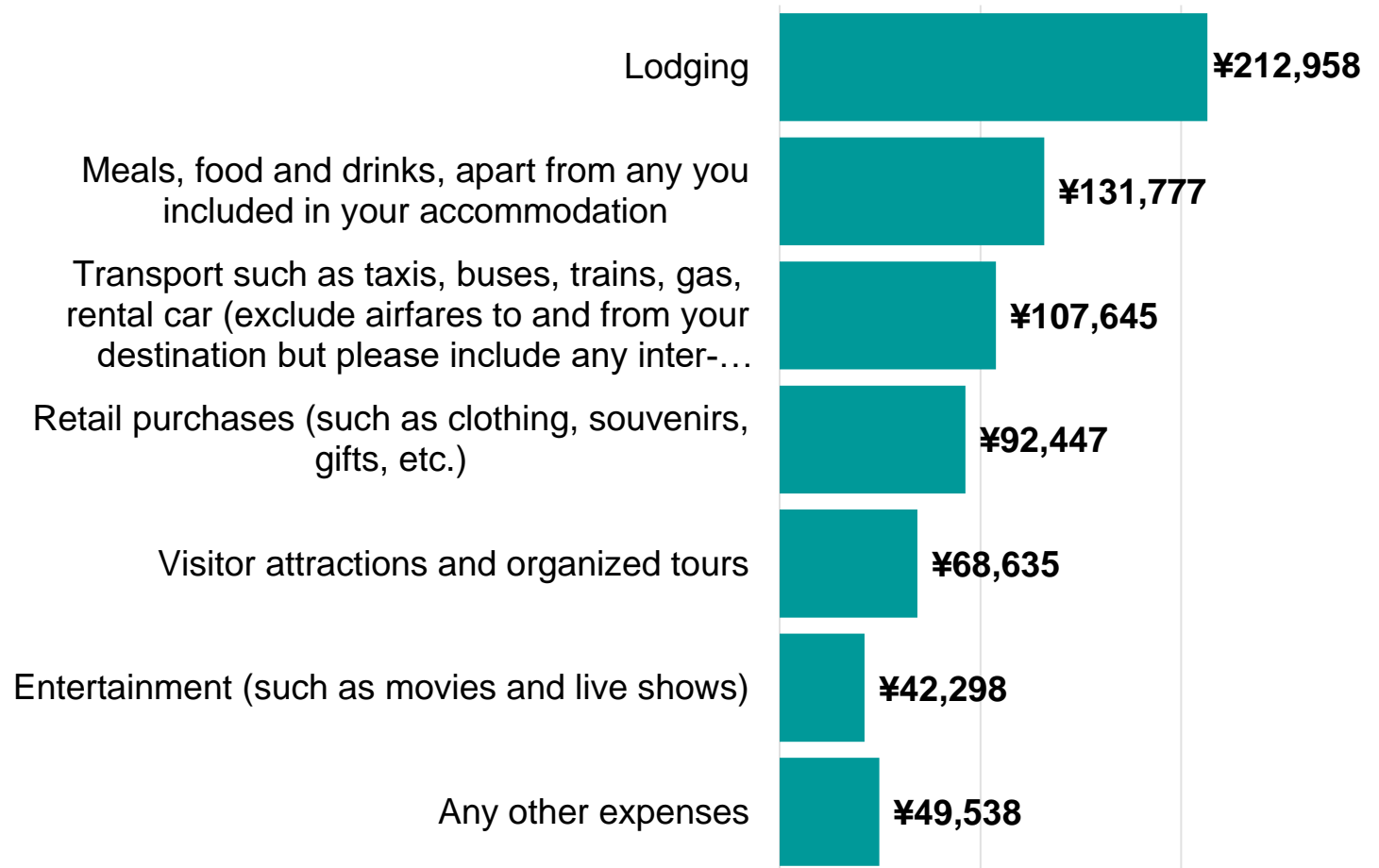
Distance Travelled on Annual Vacation



Sample Size: n=75

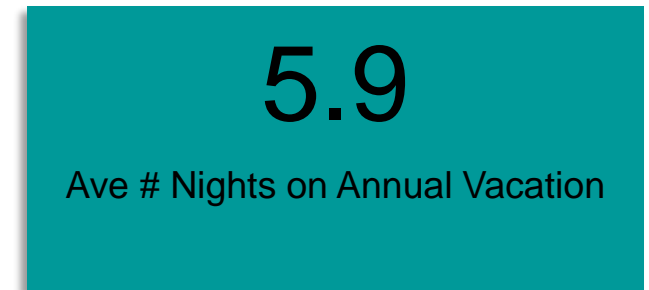
Japan Affluent Travelers: Annual Vacation

Average Spend



Sample Size: n=75

Spend Per Person Per Day

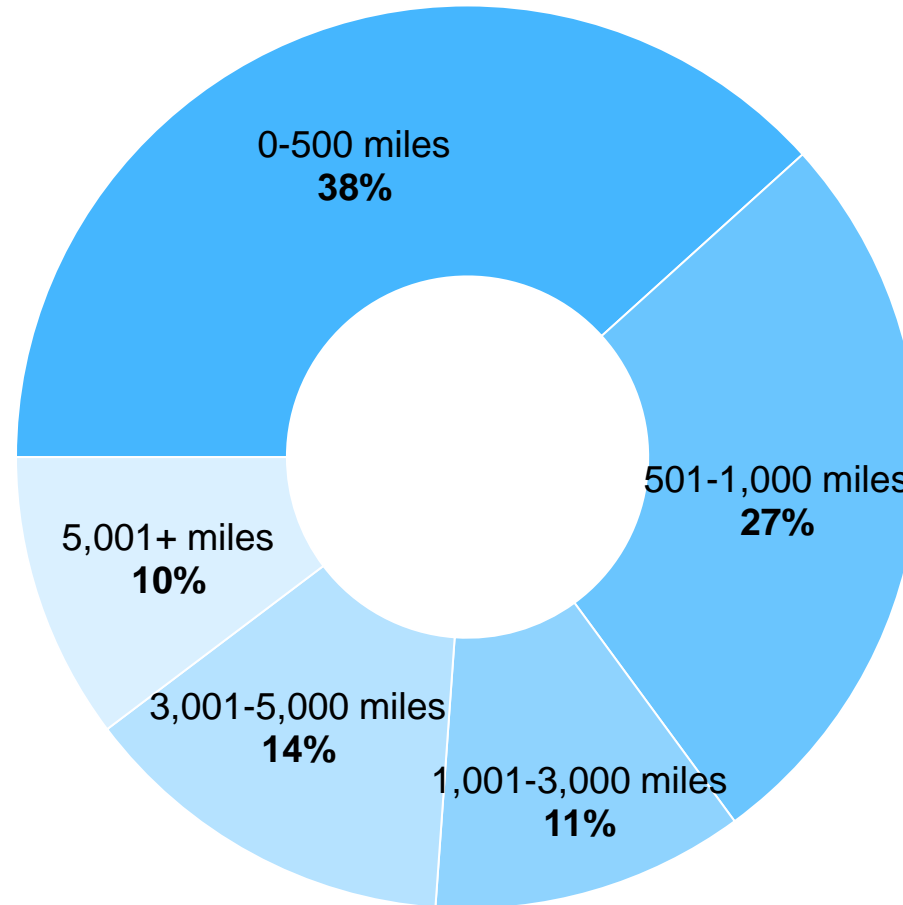


¥60,758

Ave. Per Person Per Day Spend

Japan Active Senior Travelers: Annual Vacation

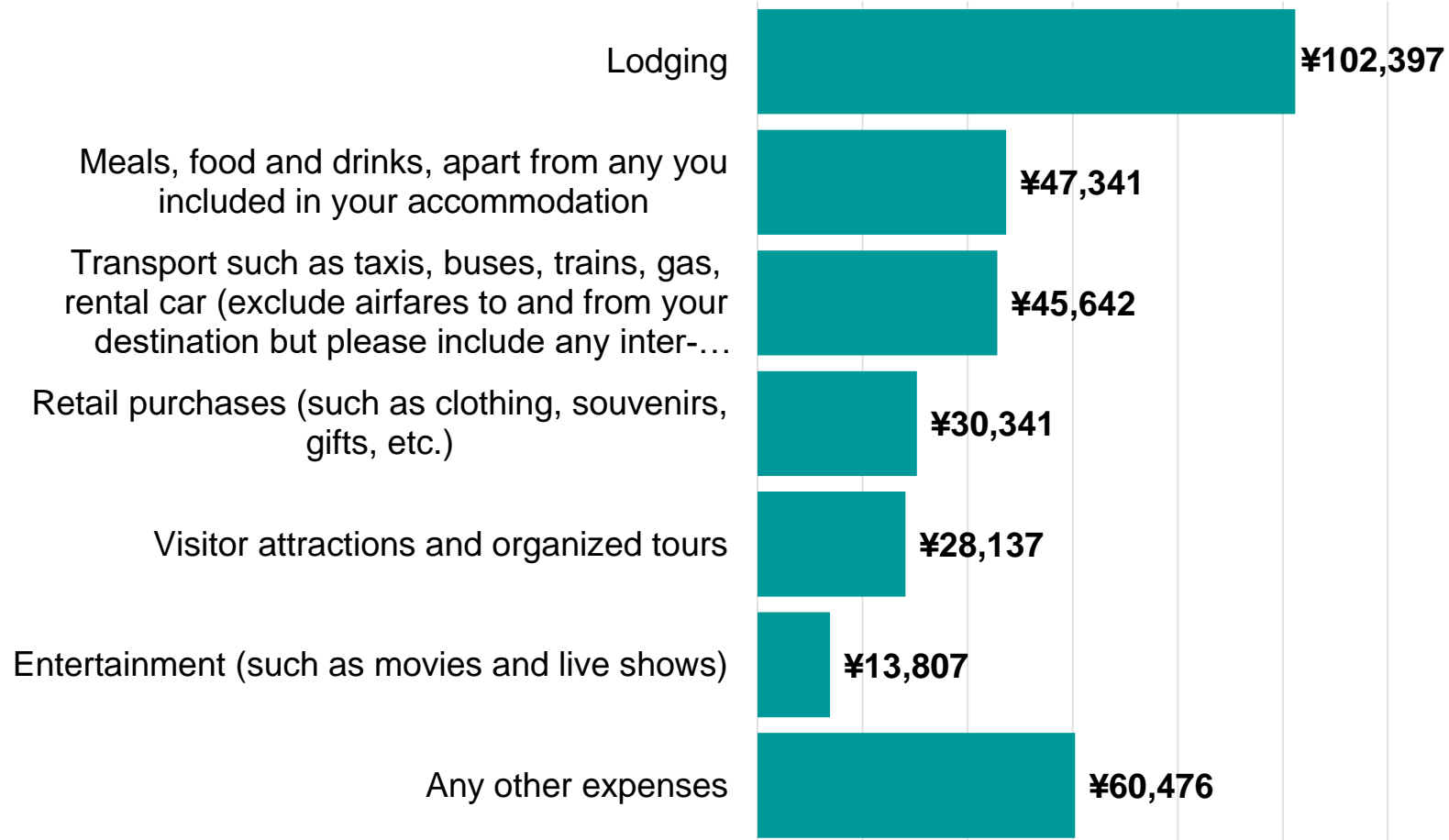
Distance Travelled on Annual Vacation



Sample Size: n=58

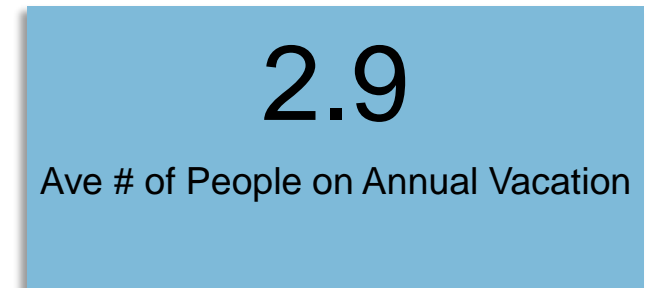
Japan Active Senior Travelers: Annual Vacation

Average Spend



Sample Size: n=58

Spend Per Person Per Day

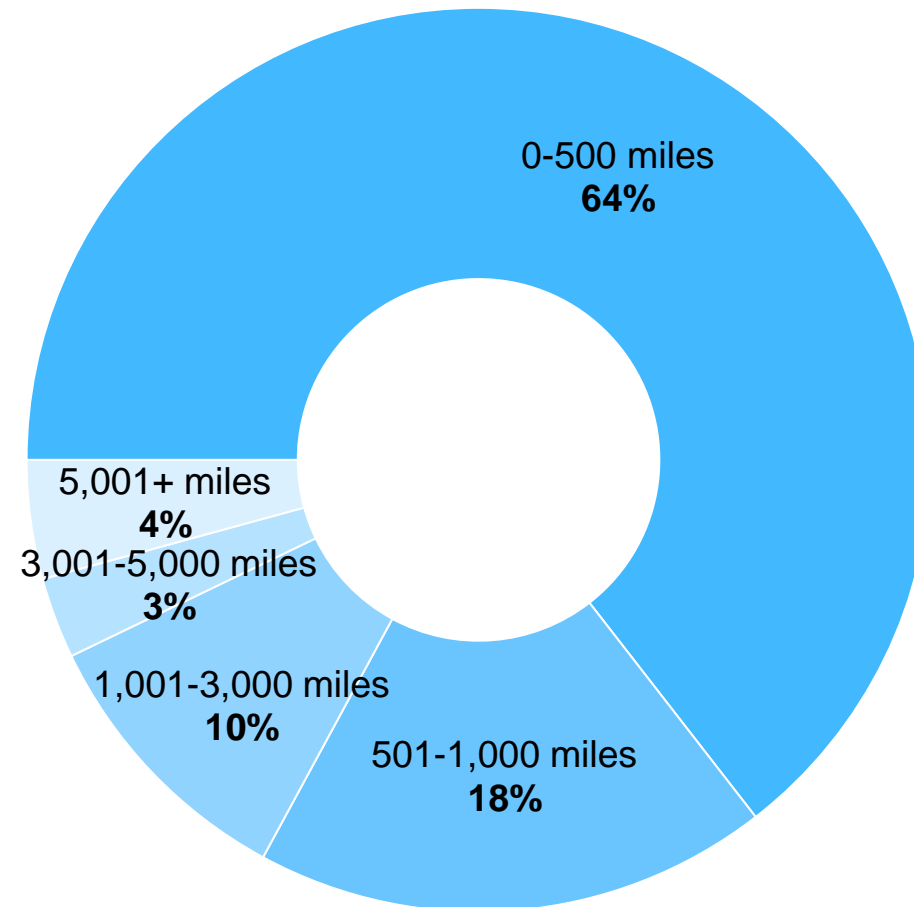


¥42,587

Ave. Per Person Per Day Spend

Japan Nat Rep: Annual Vacation

Distance Travelled on Annual Vacation



Sample Size: n=5,374

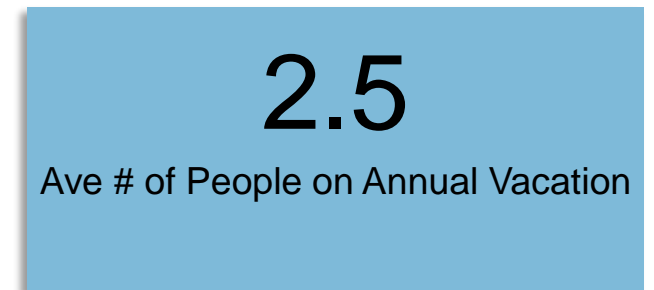
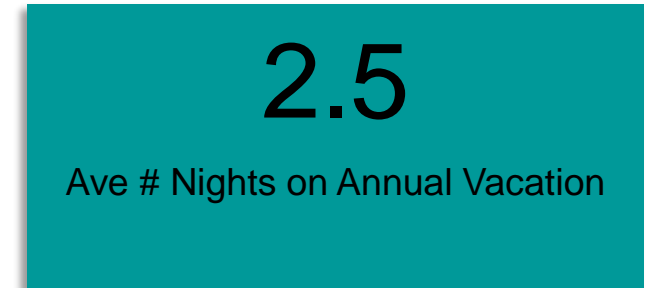
Japan Nat Rep: Annual Vacation

Average Spend



Sample Size: n=5,374

Spend Per Person Per Day



¥30,692
Ave. Per Person Per Day Spend

Japan - Importance of Travel Factors

	Very Important 5			
	Japan: Avid Traveler	Japan: Affluent Traveler	Japan: Active Senior Traveler	Japan Market
Value for money	18%	32%	14%	23%
Comfort and accessibility	27%	44%	36%	33%
Natural attractions/activities	0%	34%	35%	23%
Family friendly locations and activities	27%	35%	20%	22%
Opportunity to experience local restaurants/businesses	0%	23%	11%	15%
Cultural attractions	27%	23%	33%	22%
Entertainment and nightlife	0%	18%	13%	12%
Consideration of sustainable principles	0%	12%	10%	8%

Sample Size:

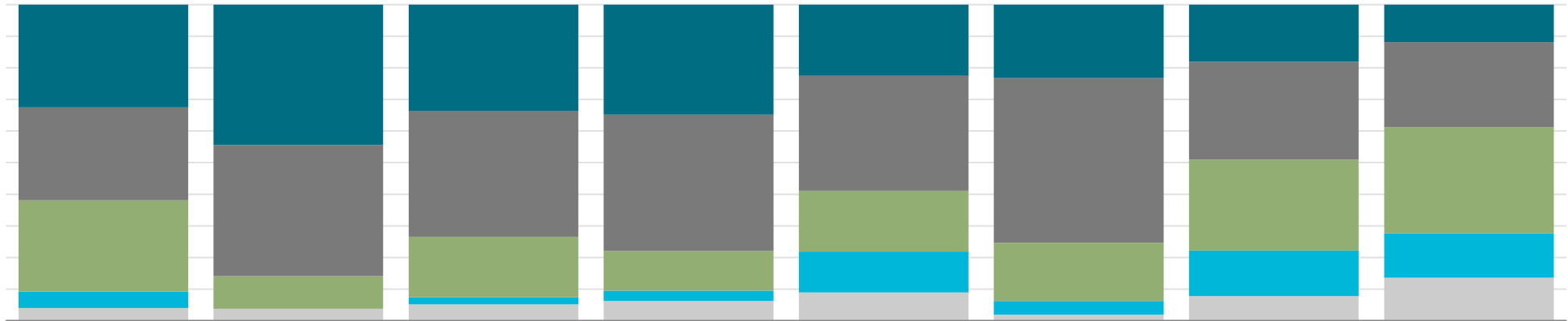
n=8

N=75

n=58

n=5,374

Japan Affluent Travelers: Importance of Travel Factors

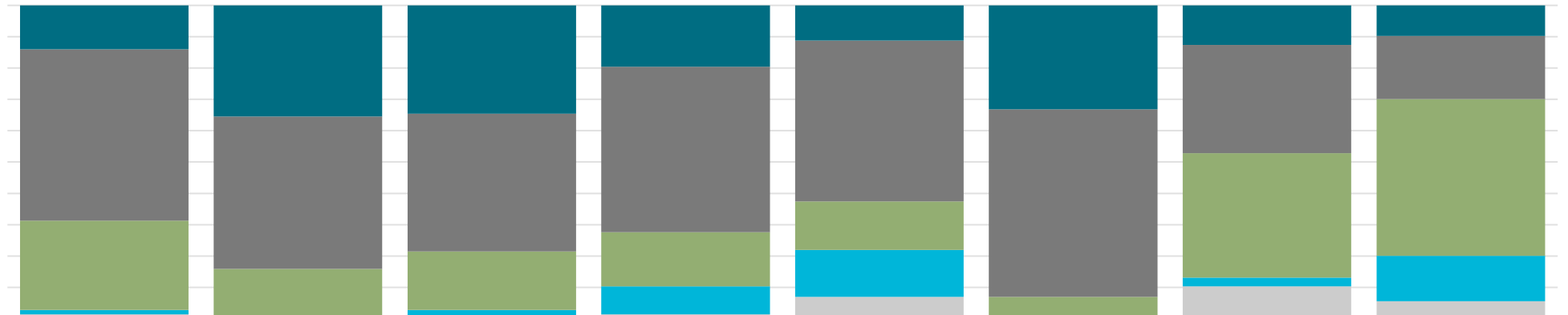


	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles
■ Very Important 5	32%	44%	34%	35%	23%	23%	18%	12%
■ 4	29%	42%	40%	43%	36%	52%	31%	27%
■ 3	29%	10%	19%	13%	19%	18%	29%	34%
■ 2	5%	0%	2%	3%	13%	4%	14%	14%
■ Not very Important 1	4%	4%	5%	6%	9%	2%	8%	14%

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

Sample Size: n=75

Japan Active Senior Travelers: Importance of Travel Factors

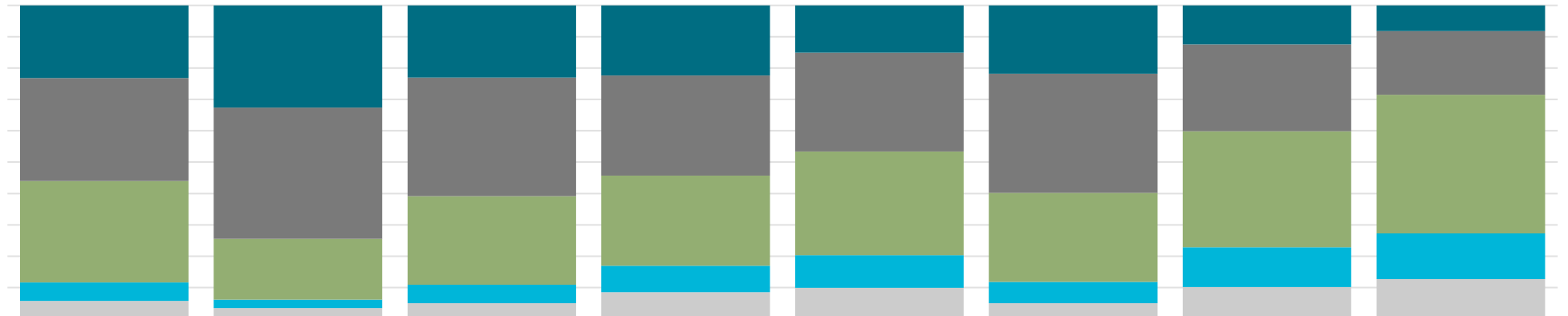


	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles
■ Very Important 5	14%	36%	35%	20%	11%	33%	13%	10%
■ 4	55%	49%	44%	53%	51%	60%	35%	20%
■ 3	29%	16%	19%	17%	15%	7%	40%	50%
■ 2	1%	0%	3%	9%	15%	0%	3%	14%
■ Not very Important 1	1%	0%	0%	1%	7%	0%	10%	6%

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

Sample Size: n=58

Japan Nat Rep: Importance of Travel Factors



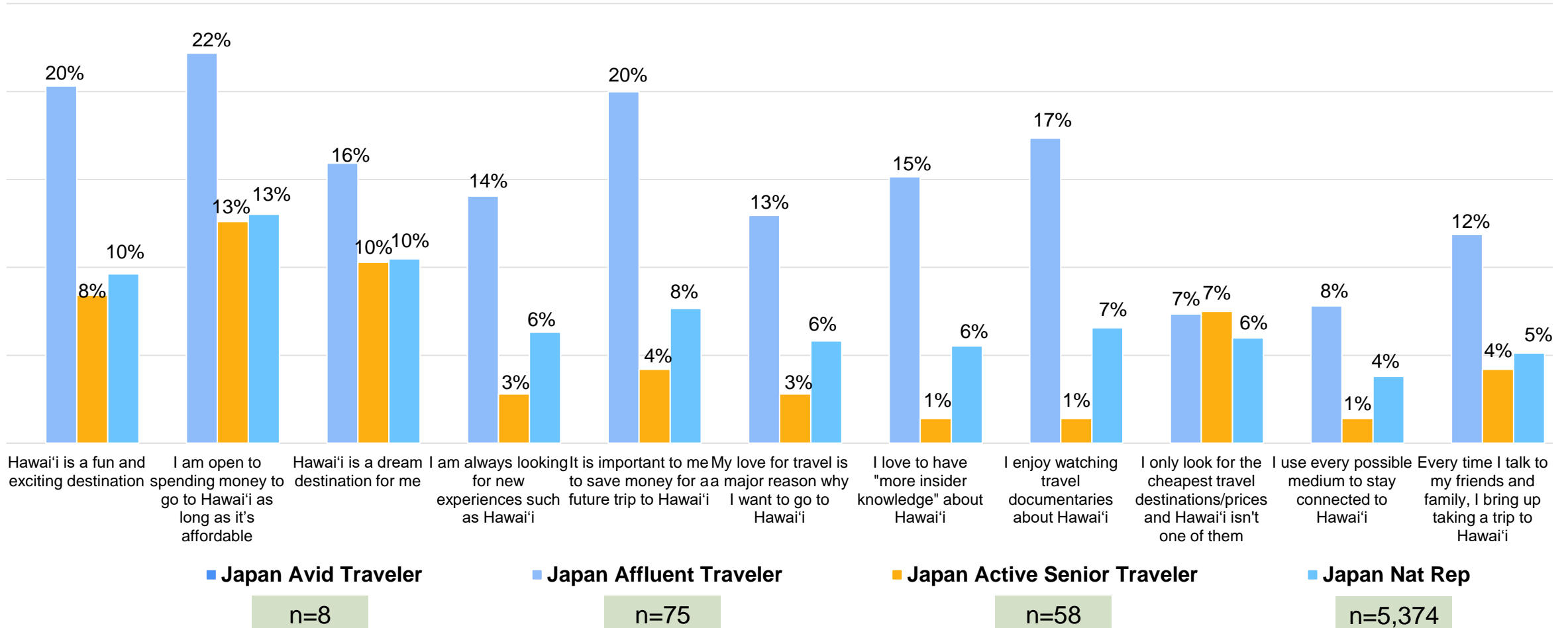
	Value for money	Comfort and accessibility	Natural attractions/activities	Family friendly locations and activities	Opportunity to experience local restaurants/businesses	Cultural attractions	Entertainment and nightlife	Consideration of sustainable principles
■ Very Important 5	23%	33%	23%	22%	15%	22%	12%	8%
■ 4	33%	42%	38%	32%	32%	38%	28%	20%
■ 3	32%	19%	28%	29%	33%	28%	37%	44%
■ 2	6%	3%	6%	8%	10%	7%	13%	15%
■ Not very Important 1	6%	3%	5%	9%	10%	5%	10%	13%

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

Sample Size: n=5,374

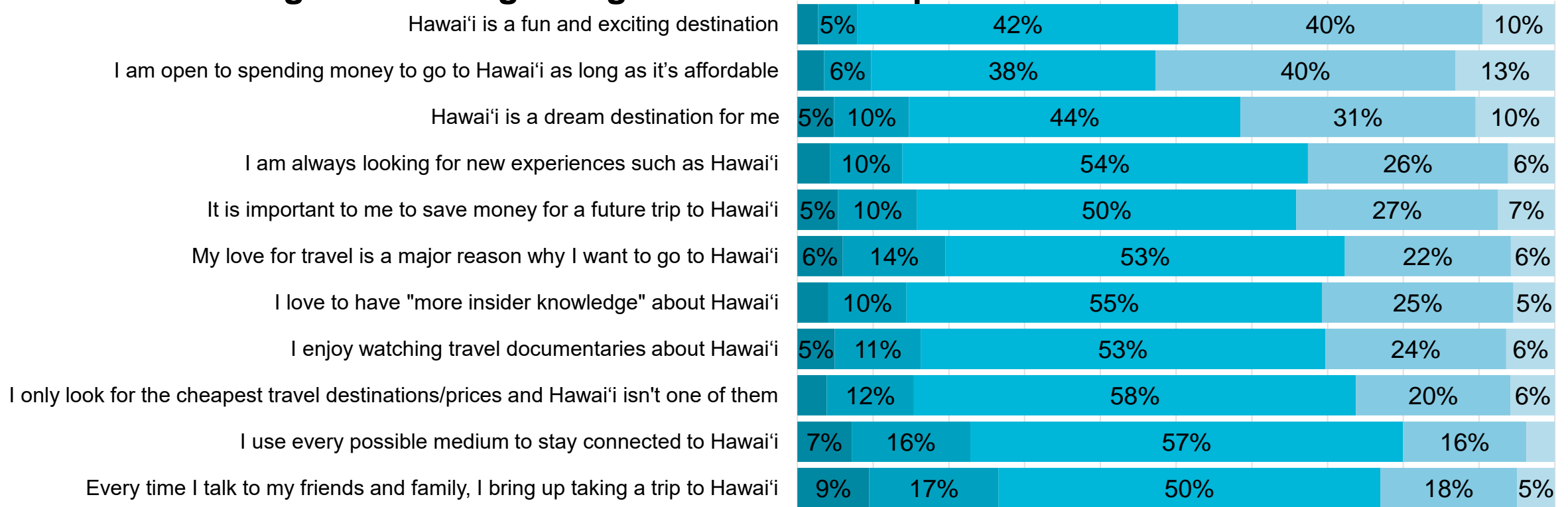
Japan - Hawai'i as an Aspirational Destination

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



Japan Affluent Travelers: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

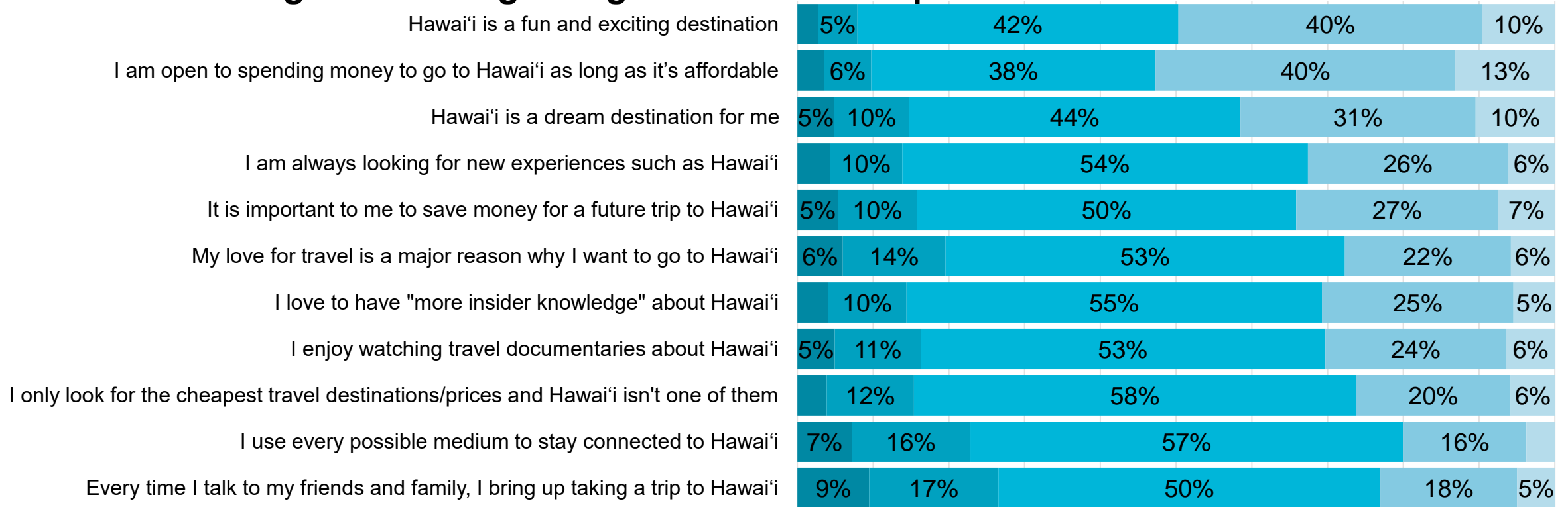


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=75

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

Agreement Regarding Hawai'i as an Aspirational Destination

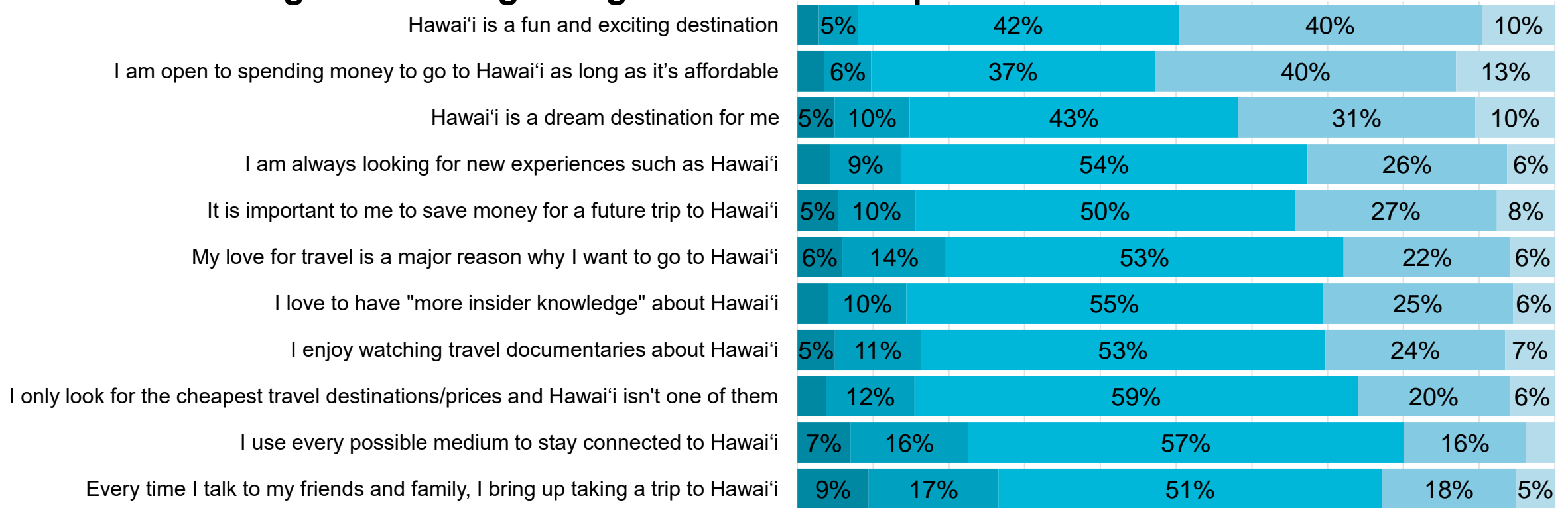


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=58

Japan Nat Rep: Hawai'i as an Aspirational Destination

Agreement Regarding Hawai'i as an Aspirational Destination

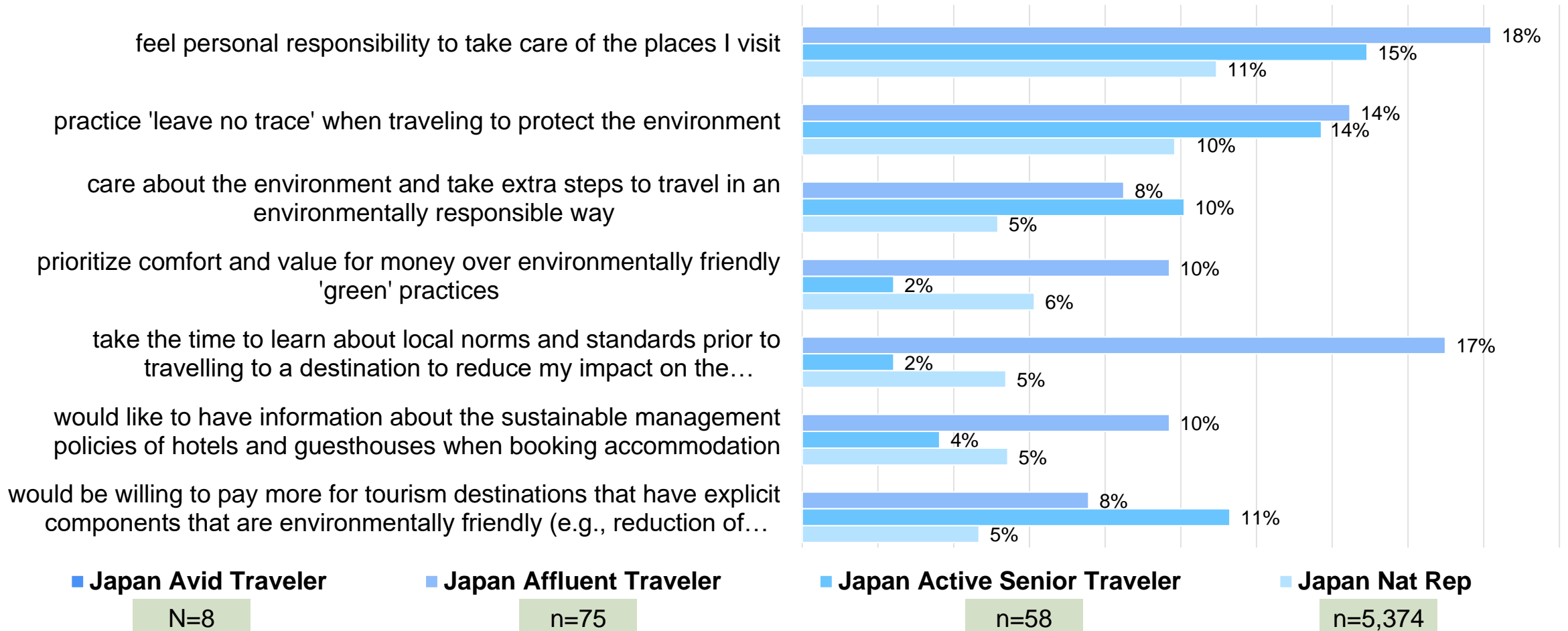


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=5,374

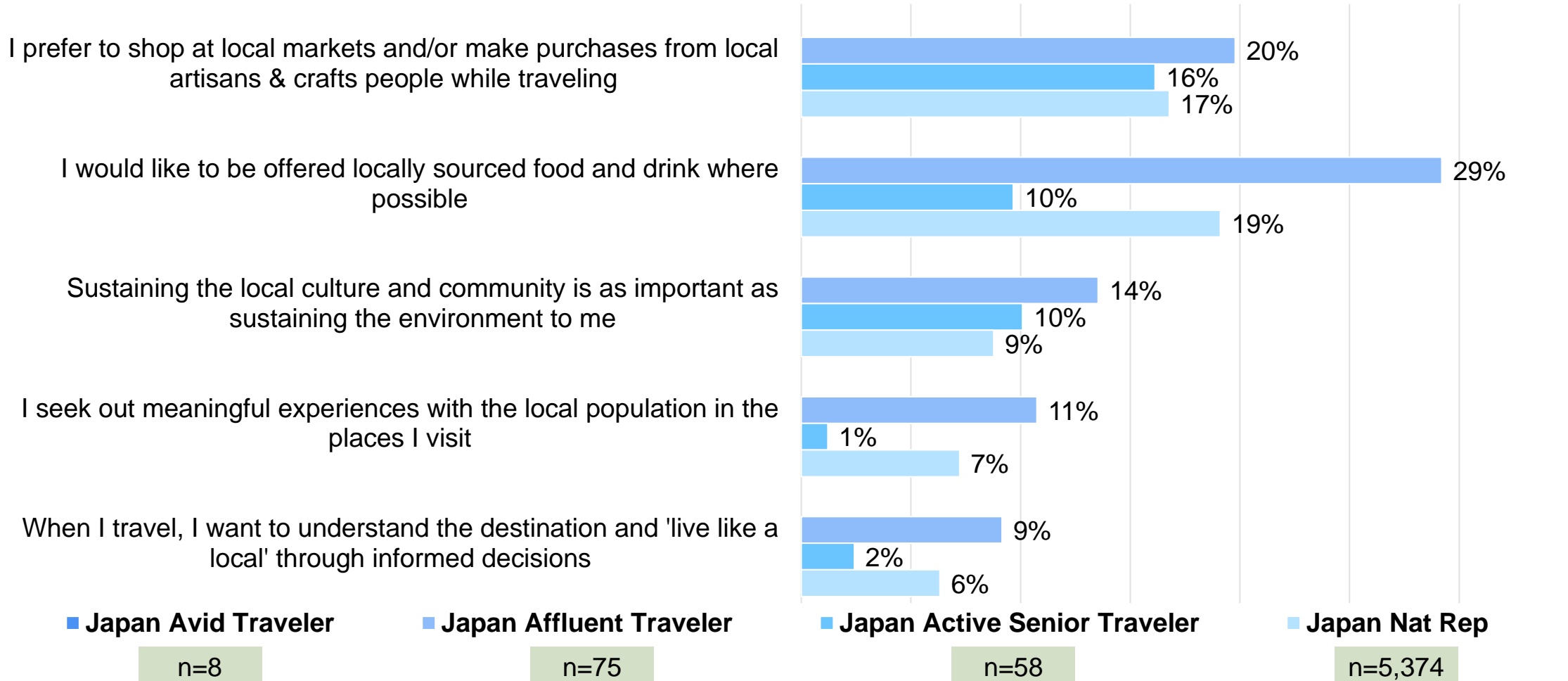
Japan - Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling (Strongly Agree)



Japan - Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling (Strongly Agree)



Japan Affluent Travelers: Sustainability and Travel Responsibility Statements

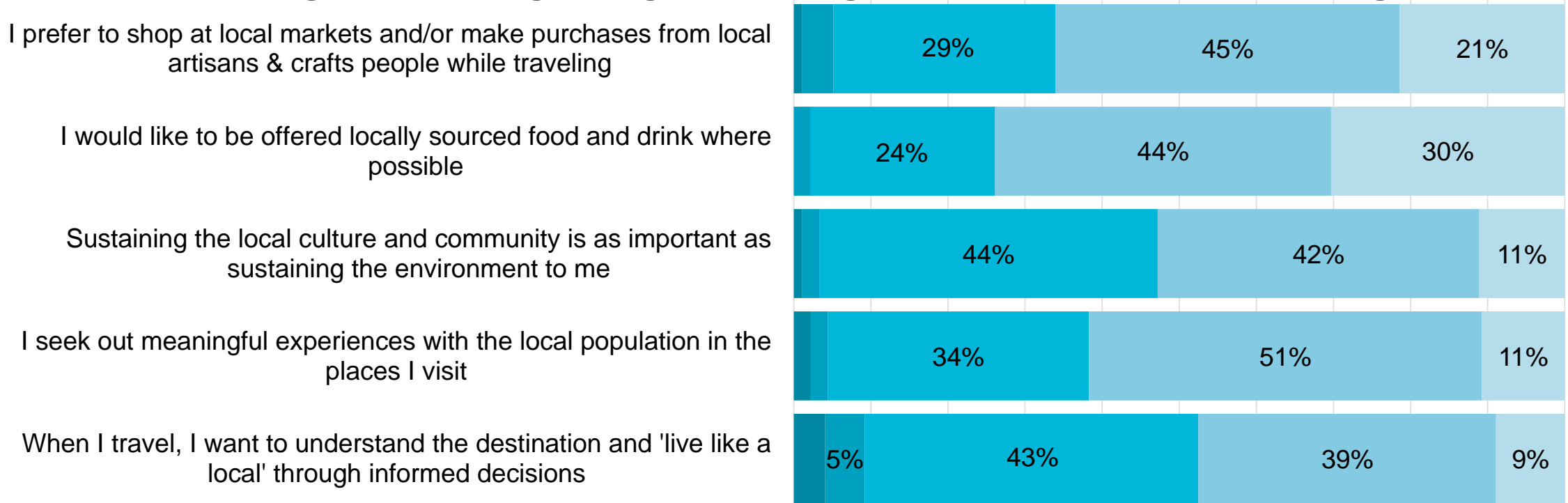
Agreement Regarding Sustainable Practices While Traveling

No data available

Sample Size: n=75

Japan Affluent Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

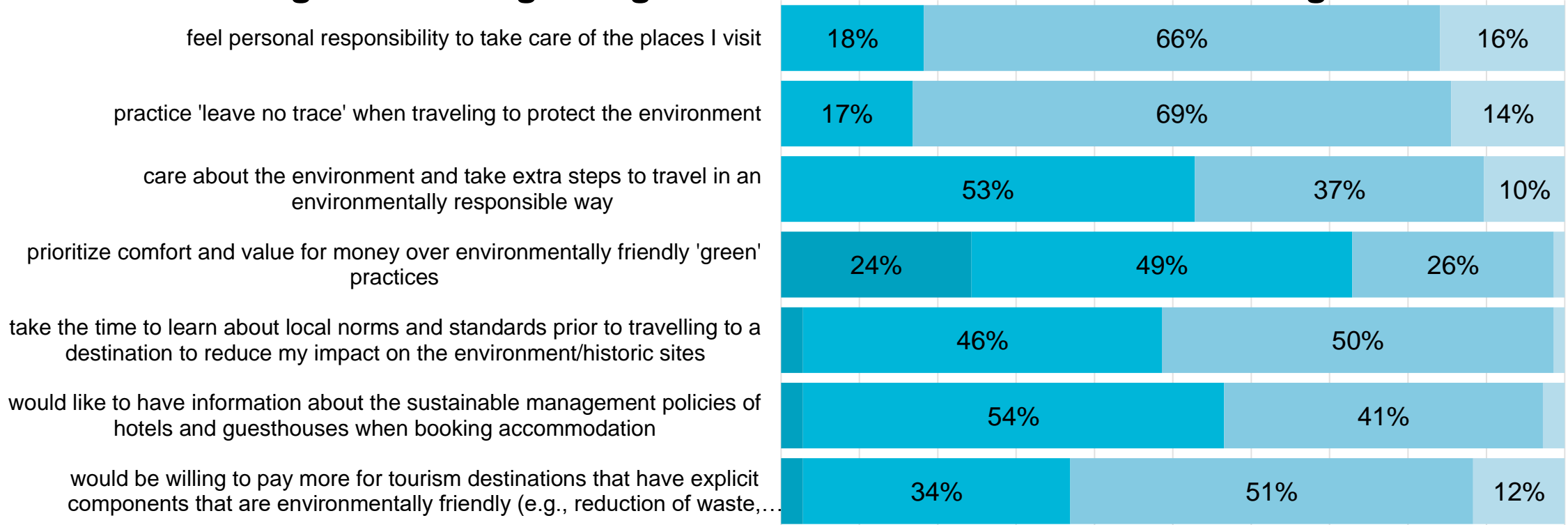


■ Strongly disagree ■ Disagree ■ Neither agree nor disagree ■ Agree ■ Strongly agree

Sample Size: n=75

Japan Active Senior Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

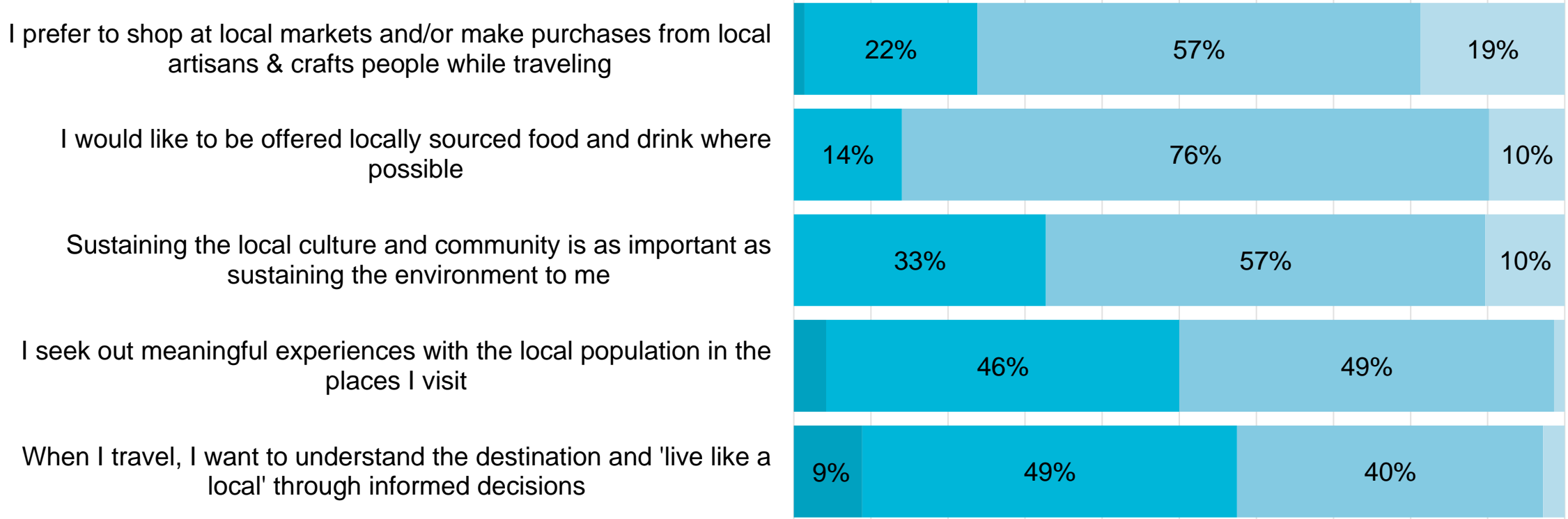


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=58

Japan Active Senior Travelers: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

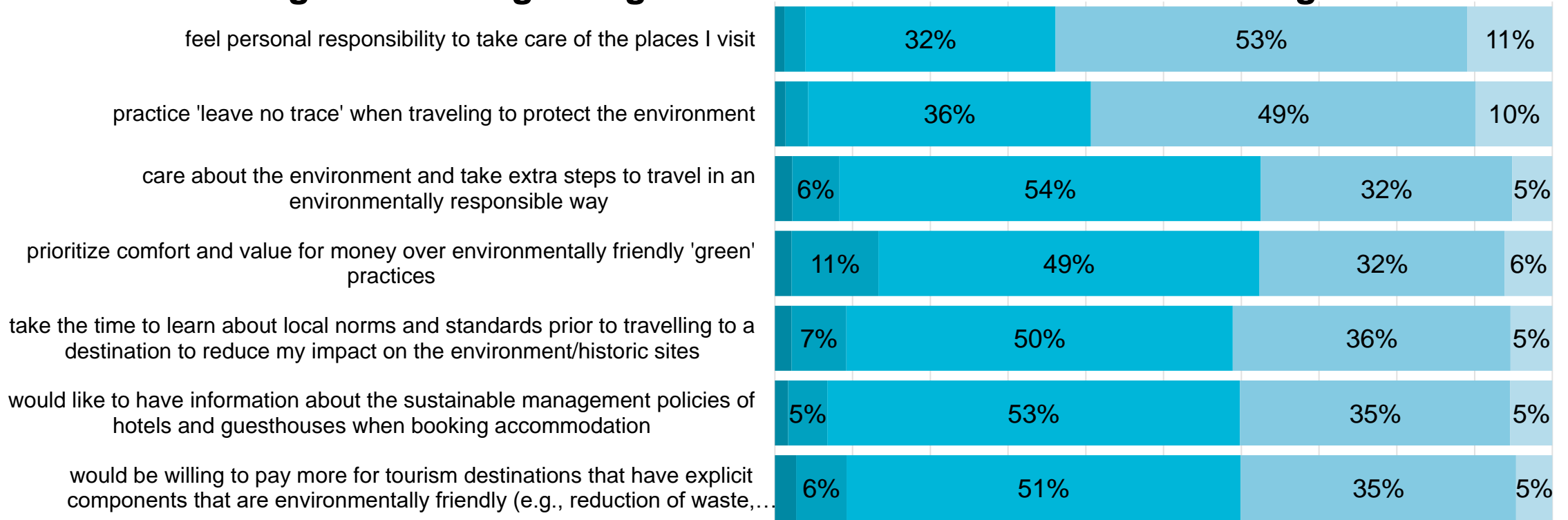


■ Strongly disagree
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 ■ Neither agree nor disagree
 ■ Agree
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Sample Size: n=58

Japan Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustainable Practices While Traveling

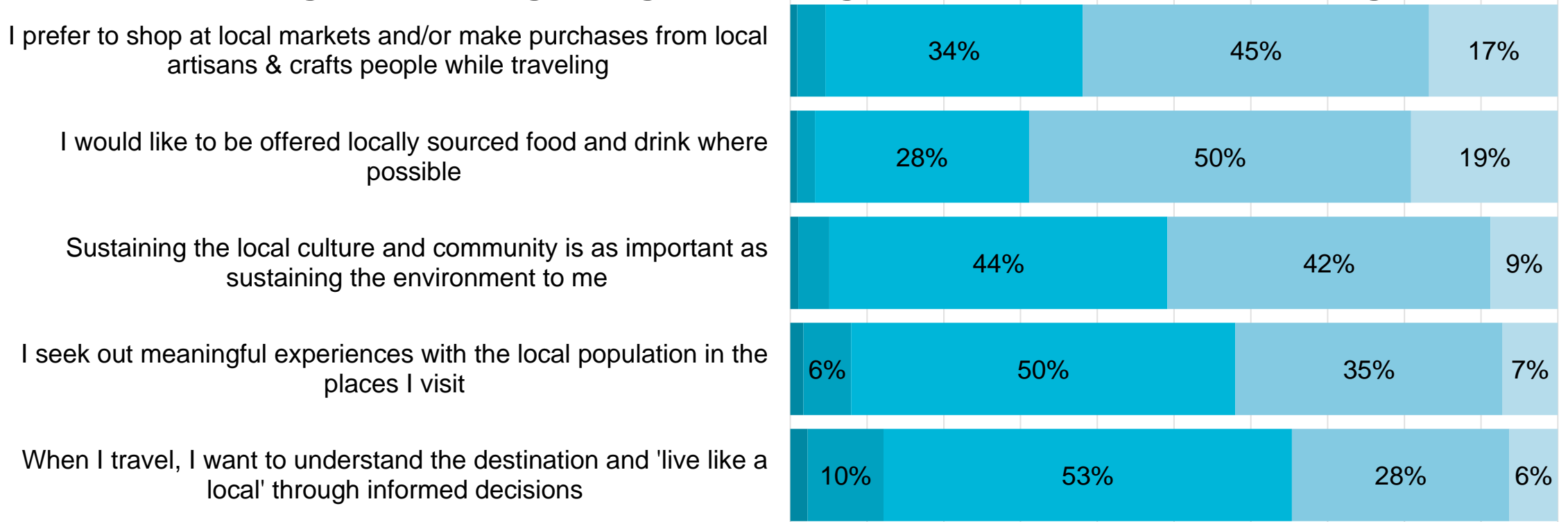


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

Sample Size: n=5,374

Japan Nat Rep: Sustainability and Travel Responsibility Statements

Agreement Regarding Sustaining Local Culture While Traveling

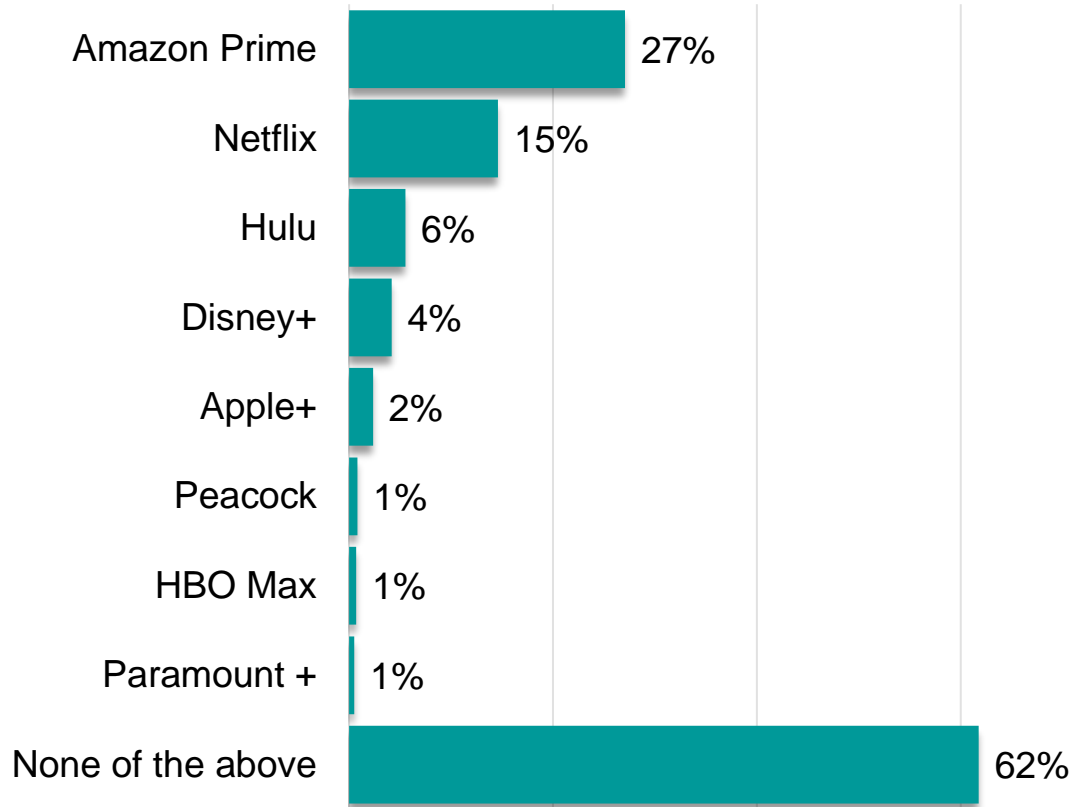


■ Strongly disagree
 ■ Disagree
 ■ Neither agree nor disagree
 ■ Agree
 ■ Strongly agree

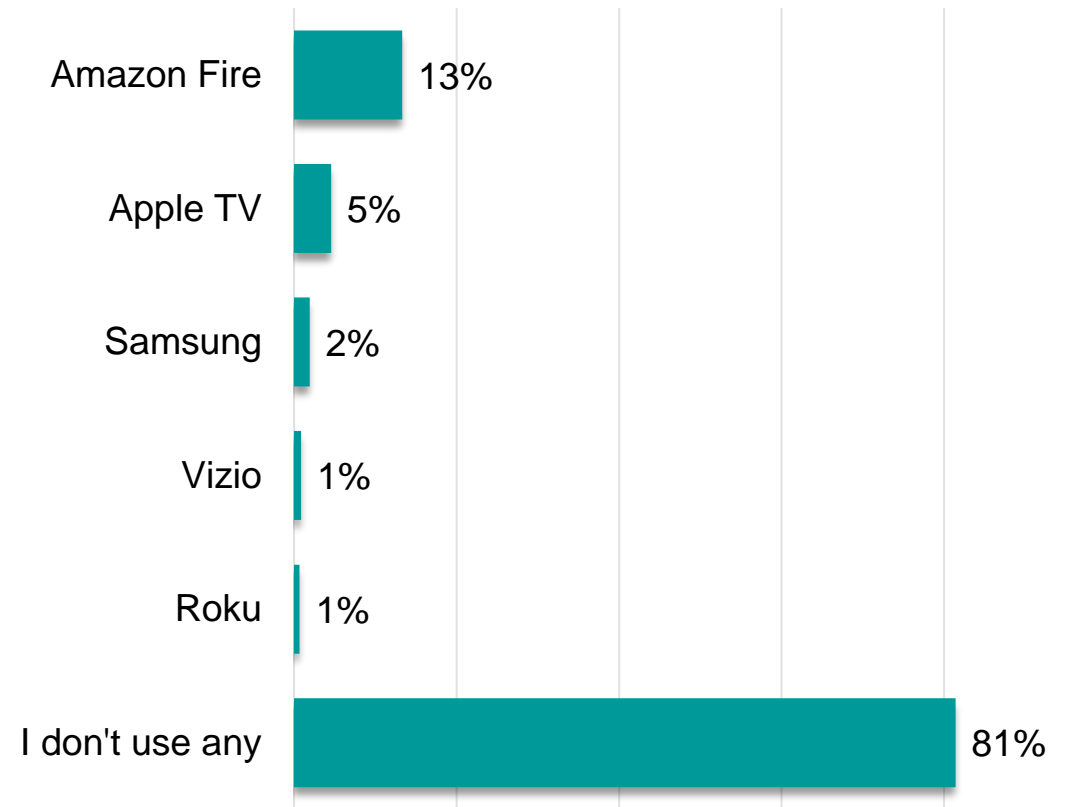
Sample Size: n=5,374

Japan Media Consumption

Streaming Platforms Used Weekly



Connected Device Used

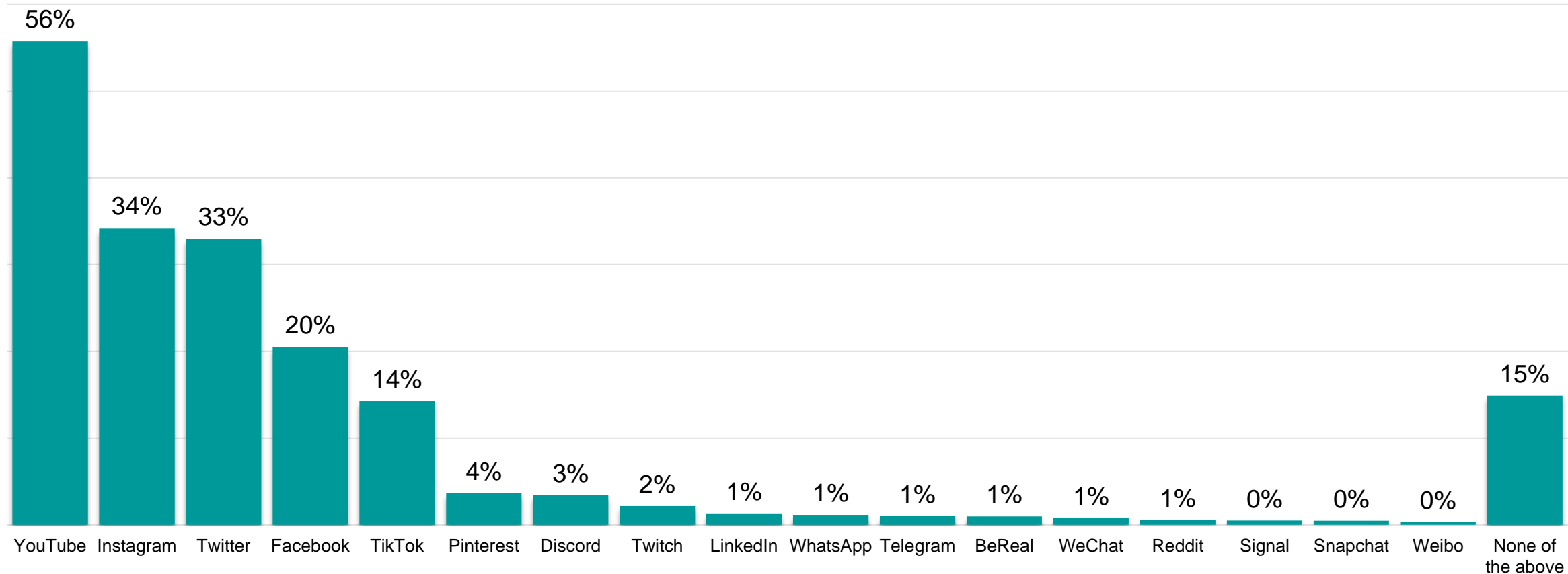


Sample Size: n=5,374

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=5,374

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	38%
Online	33%
Radio	5%
TV commercials	23%
Newspaper	17%
Friends/Family	35%
Social Media	28%
YouTube	30%
Out of Home Advertising (e.g., poster billboards, bus shelter advertisements, etc.)	11%
Email	8%
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	54%
I look up the destination on social media	20%
I talk to friends/family about the destination	27%
I book travel to the destination almost immediately	5%
I don't do anything	13%
None of the above	9%

Sample Size: n=5,374

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**