

Trends of Malaysian Incentive Travel to Japan 2025

Compiled by JNTO Kuala Lumpur Office

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Disclaimer:

All statistics data is based on the information collected by JNTO Kuala Lumpur office from local travel agencies in Malaysia.

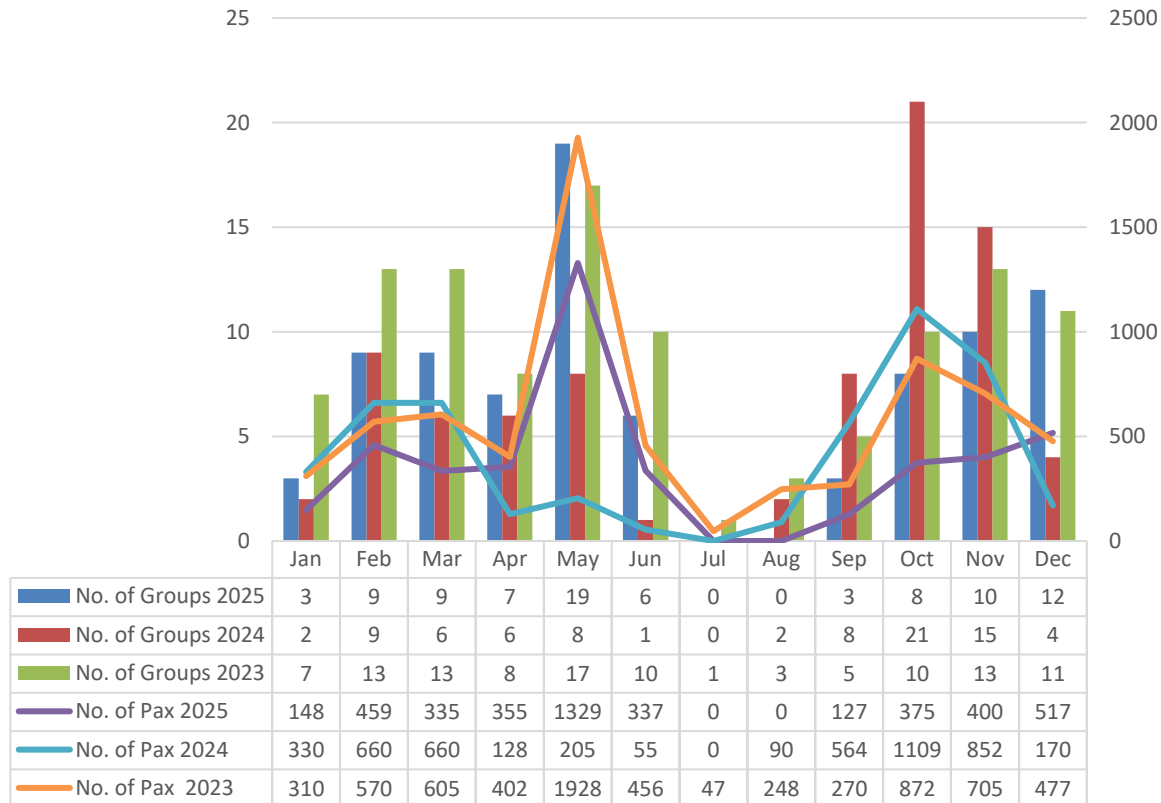
The numbers might be inaccurate due to the non-reported incentive cases.

Overview

	2025	2024	2023
No. of Groups* <small>*Including staggered groups from same organizer</small>	86	82	111
Total No. of Pax	4,382	4,891	6,948
Average Duration of Stay in Japan	5 Nights	5 Nights	5 Nights

- **JNTO HQ Incentive Support Policy Change (FY2024 & FY2025)**
JNTO HQ has implemented new requirements, such as at least 1-night stay out of major metropolitan areas and applicants can receive support only from JNTO HQ or local CVBs (not both), resulted in fewer tracked applications in FY2024 & FY2025.

No. of Groups* & No. of Pax by Month 2025

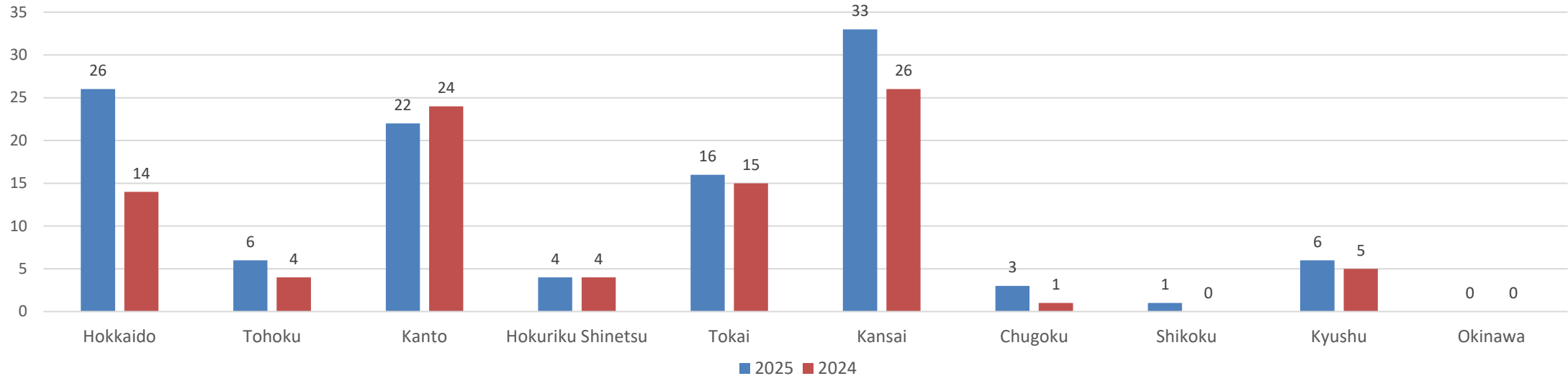


*Including staggered groups from same organizer

- Seasonality & Comfort**
 Summer heat, humidity, rainy season, and Obon period between June to August, reduced program feasibility and comfort for incentive groups.
- Corporate Award Cycles**
 Recognition programs typically align with mid-year and year-end performance milestones, reinforcing spring (April~May) and autumn (October~November) travel.
- Colourful Floral Season in May**
 Post-sakura spring offers vibrant floral attractions paired with comfortable weather before the rainy season, making May a highly preferred month for incentive groups.

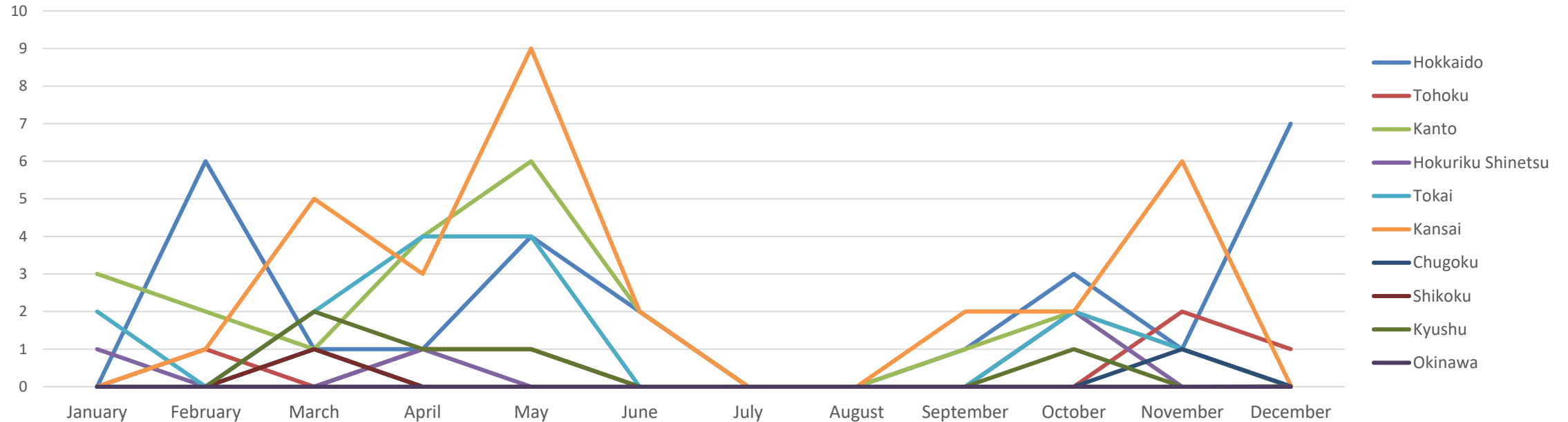
No. of Groups by Destinations 2025

*Each area contains the data of same group visiting multiple areas.



- **Kansai, Hokkaido, Kanto and Tokai dominate Malaysian incentive travel in 2025**, reflecting preference for proven, high-recognition destinations with strong incentive infrastructure.
- **Golden Route itineraries (Kanto-Tokai-Kansai) influence regional ranking**, and when accounting for cross-regional travel, Hokkaido, Kansai and Kanto emerge as the most impactful incentive destinations.
- **Direct air connectivity from Kuala Lumpur is a key decision driver**, with Kanto, Kansai and Hokkaido serving as the main gateways offering easier logistics and lower operational risk for incentive groups.
- **Hokkaido saw around 50% year-on-year growth in incentive groups compared to 2024**, driven by destination differentiation, seasonal appeal, and lower congestion.

Monthly No. of Groups by Destinations 2025



- **Kanto & Kansai**

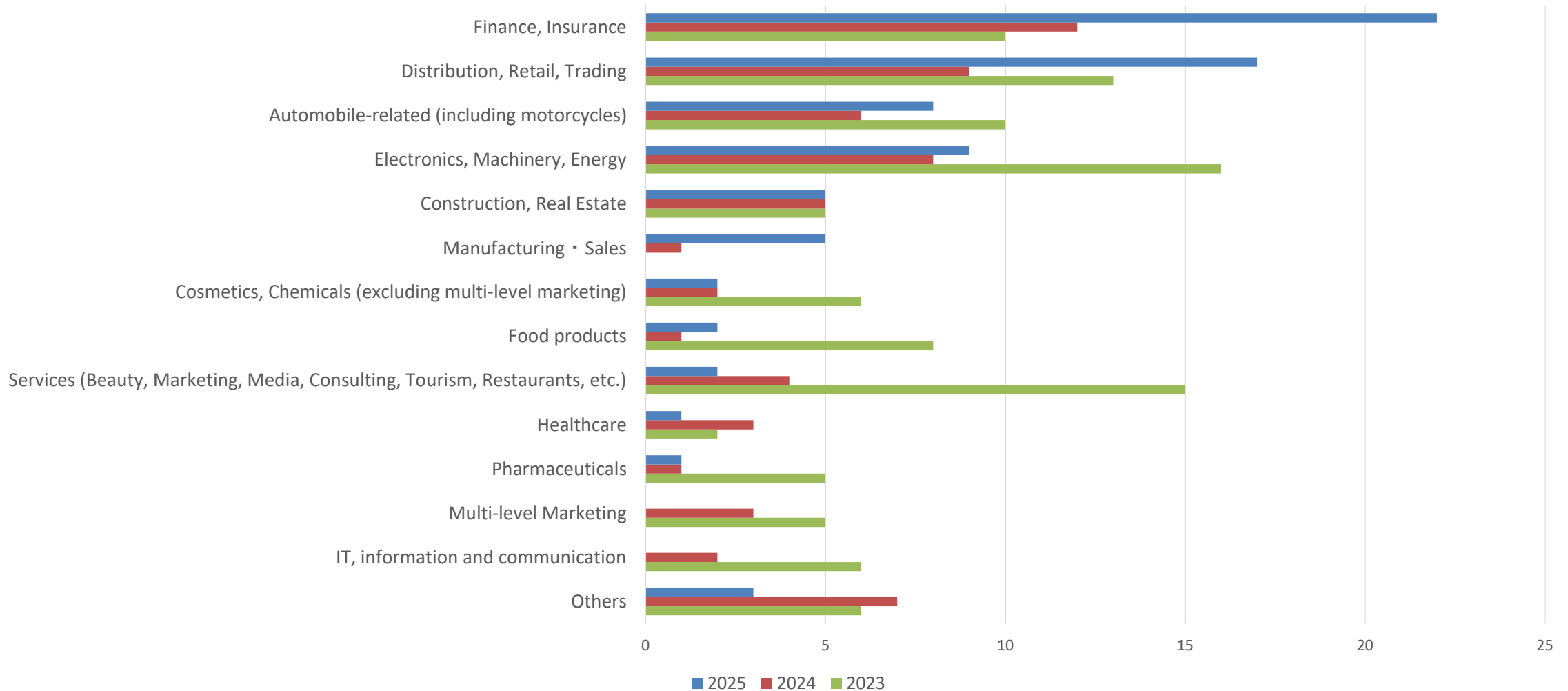
Strong May pull supported by favorable climate and Osaka Expo 2025 momentum

- **Hokkaido**

Winter-led peaks in February and December, anchored by snow activities, winter festivals and seasonal experiences that strongly appeal to Malaysian incentive market.

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No. of Groups by Business Type 2025

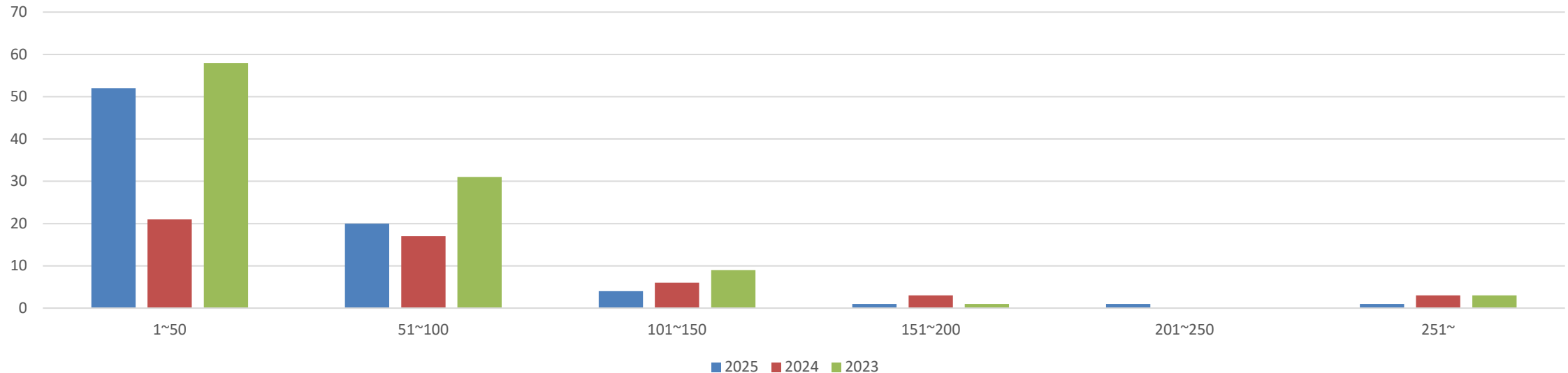


Tour Fee per pax ※All amount rounded up

2025	Total Tour Fee	Ground Fee	2024	Total Tour Fee	Ground Fee
Average	\$2,552	\$1,777	Average	\$2,267	\$1,609
Median	\$2,450	\$1,685	Median	\$2,000	\$1,520

- **Osaka Expo 2025 has driven more tourists to the Kansai area, creating higher room demand and pushing up average daily rate (ADR) and occupancy sharply higher across Kansai area.**
- **Weak yen attracted more incentive travel, but suppliers raised ADR and package pricing to capture demand, offsetting currency advantage.**
- **A stronger Ringgit (supported by FDI inflows and stable policy) and improved business sentiment gave companies added confidence to commit to cross-border incentives.**

Group Size



- **Typical Group Size & Transport Feasibility**

Most Malaysian incentive groups fall within 20–80 pax, allowing smooth movement with 1–2 medium or large coach buses.

- **Staggered Departures for Large Groups**

Groups above 100 pax are often split across at least two departure dates to reduce transportation and operational risks.

※Based on day-to-day feedback from Malaysian travel agents.

- **Strict Coach Regulations in Japan**

Driver-hour limits make large-group movements more complex, requiring multiple buses and longer transfer times, which also limits the feasibility of using unique venues compared to hotel banquet halls.

- **Higher Manpower & Vehicle Requirements**

Large groups need multiple buses and licensed drivers, significantly increasing costs during an Expo-driven shortage year.

- **Restaurant Capacity Limitations**

Most restaurants in Japan are built for small-medium seating, making it difficult to host groups above 80-100 pax without splitting the group or using multiple time slots.

- **Lack of Local Land Operator Information**

Local operator details are limited in second-tier or lesser-known destinations, often requiring the use of major-city DMCs, which raises costs and increases the risk of slower on-ground support during emergencies.

【Contact Information】

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