

Seasonal Tendency of the Number of Hotel Guests in Three Prefectures of Hokuriku District

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1. Introduction

Sightseeing activities have experienced a revival since various restrictions regarding COVID-19 were lifted in Japan in 2023, and both Japanese and foreign tourists have returned to many areas of Japan. Particularly, the number of foreign tourists visiting Japan has exhibited a rapid recovery. In fact, according to the Japan National Tourism Organization (JNTO) (2025), in 2024, a record-high number of foreign visitors (approximately 36.9 million) visited Japan, and the number of foreign hotel guests was 163.6 million according to the Japan Tourism Agency (2015-2025). In 2024, the number of Japanese hotel guests was 486.7 million, which is approximately 2.97 times that of foreign ones, but the difference between them has been gradually declining ¹⁾. This tendency varies according to regions in Japan, and the differences of that tendency level sometimes may give influences to regions in some ways.

Generally, one of the main problems in the tourism industry is the significant variation in the number of tourists in the “on-season” and “off-season.” Tourism demand during on-season periods may lead to a sense of “too many tourists” and “overtourism” among local inhabitants.

Therefore, this study seeks to determine how the changes in the number of tourists occur in various regions of Japan. The number of hotel guests is used as the basic unit of analysis. The target region for the case

study is Hokuriku District, which consists of three prefectures of Toyama, Ishikawa, and Fukui. Hokuriku District is located in the central area of Japan, facing the Sea of Japan. This region is renowned for its natural beauty, cuisine, and historical and cultural institutions. The travel time from Tokyo and Kansai areas to Hokuriku District takes approximately two to three hours by Shinkansen bullet or super express trains.

2. Number of hotel guests in three prefectures of Hokuriku District

First, as basic information, the number of total hotel guests in three prefectures of Hokuriku District was confirmed. In 2024, Toyama prefecture had 3.68 million hotel guests (Japanese: 3.43 million, foreigners: 240 thousand), Ishikawa prefecture had 11.87 million (Japanese: 9.59 million, foreigners: 2.28 million) and Fukui prefecture had 3.54 million (Japanese: 3.45 million, foreigners: 90 thousand). Since around 2012, an increase or a stable tendency was observed for the number of hotel guests in each prefecture. However, a severe decrease occurred during the COVID-19 pandemic. Particularly, the characteristic of three prefectures becomes more remarkable when the number of the hotel guests is divided into Japanese and foreigners. As is shown in Figures 1 and 2, the number of Japanese hotel guests in each prefecture decreased during the pandemic; however, as a result of the “GO

TO Travel Campaign” launched during that time to incentivize sight-seeing, this decrease appeared relatively small. For example, in 2021, Toyama, Ishikawa, and Fukui had 2.38 million, 4.44 million, and 2.32 million Japanese hotel guests, respectively. These figures were far lower than those for 2019. However, the number of foreign hotel guests decreased significantly; in fact, Toyama, Ishikawa, and Fukui had only 11 thousand, 13 thousand, and 9 thousand, respectively.

In terms of the total number of hotel guests, Ishikawa, Toyama, and Fukui ranked 15th, 37th and 40th among 47 prefectures, respectively. Regarding the number of Japanese hotel guests, Ishikawa, Toyama, and Fukui ranked 17th, 39th, and 38th, respectively. Regarding the number of foreign hotel guests, Ishikawa, Toyama, and Fukui ranked 12th, 36th, and 46th, respectively. Overall, these figures indicate that Ishikawa was mid-ranked among 47 prefectures, while Toyama and Fukui were at the lower end (Table.1).

The countries and areas of foreign hotel guests are different in each prefecture. Figures 4, 5, and 6 present five major countries and areas in three prefectures’²⁾ related to foreign hotel guests. Notably, the majority of foreign hotel guests in Ishikawa are from the USA and European countries, but mainly from East Asia in Toyama and Fukui.

Generally, although the perception of congestion is related to an increase in the number of visitors, other factors may also have an impact. For example, whether a sustained or sudden increase may change how local inhabitants feel. Local inhabitants’ perception of overtourism maybe heightened by the rapid increase of foreign tourists to Japan. Therefore, the analysis using the aforementioned information to grasp such a

tendency between Japanese and foreigners is warranted.

This study analyzed a period of 12 months in 2024 and, among 108 months from 2015 to 2023 (12 months multiplied by 9 years), the month with the maximum number of hotel guests is counted as 1 (= the base number). The ratio of the number of hotel guests for each month in 2024 was then compared with the base number. Additionally, Japanese and foreign hotel guests are analyzed separately in each prefecture. Therefore, the month as the base number to be compared with the number of 12 months in 2024 is different in each prefecture. For example, suppose the number of hotel guests in January 2015 was 10 thousand, which is the maximum number of hotel guests from 2015 through 2023 in Prefecture X. If the number of hotel guests in January 2024 was 15 thousand in Prefecture X, the index number would be 1.5 (15 thousand divided by 10 thousand).

Accordingly, suppose that the local inhabitants perceived some congestion when the maximum number of hotel guests were staying in the prefecture. If the prefecture had a greater number of hotel guests in a month than the ex-max number of hotel guests, the congestion degree at that time may be more pronounced. Therefore, the greater the number of months with such increases, the more necessary the policies for an on-season for a region.

The results of the analysis are presented in Figures 6 and 7. First, the number of months in 2024 that exceeded the month with the ex-max Japanese hotel guests (the base number) during 2015 through 2023 was two months in Ishikawa, and none in Toyama and Fukui. Among the three prefectures, Ishikawa had the highest annual number of hotel

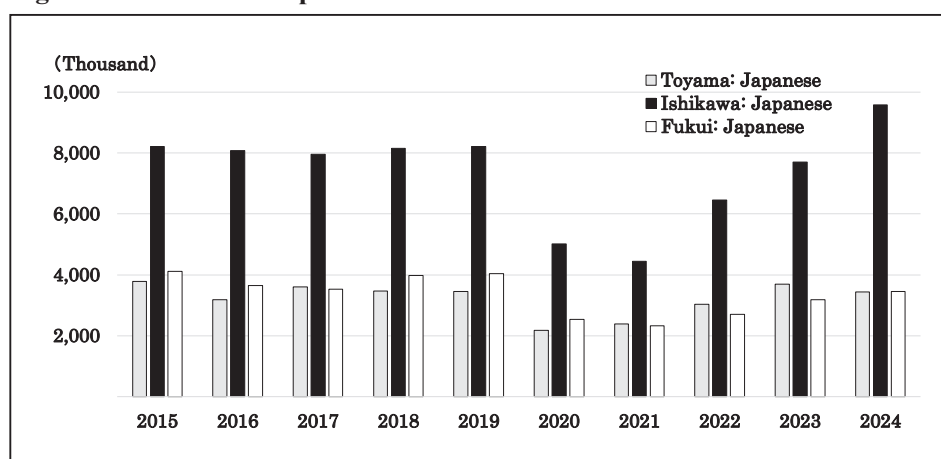
guests. In contrast, compared with 2019 or before (before the time of COVID-19), the number of Japanese hotel guests remained the same or decreased marginally in Toyama and Fukui; hence, in both prefectures in 2024, no month exceeded the ex-max number of Japanese hotel guests during those periods.

In the case of foreign hotel guests, the increase in Ishikawa has been high, but that in Toyama has stagnated. Since March 2024, the index numbers have exceeded 1 (the base number); thus, the number of foreign hotel guests from March to December in 2024 exceeded the month with the ex-max number before 2024. However, in Toyama in 2024, no month

exceeded 1. In the case of Fukui, two months (May and November) exceeded 1.

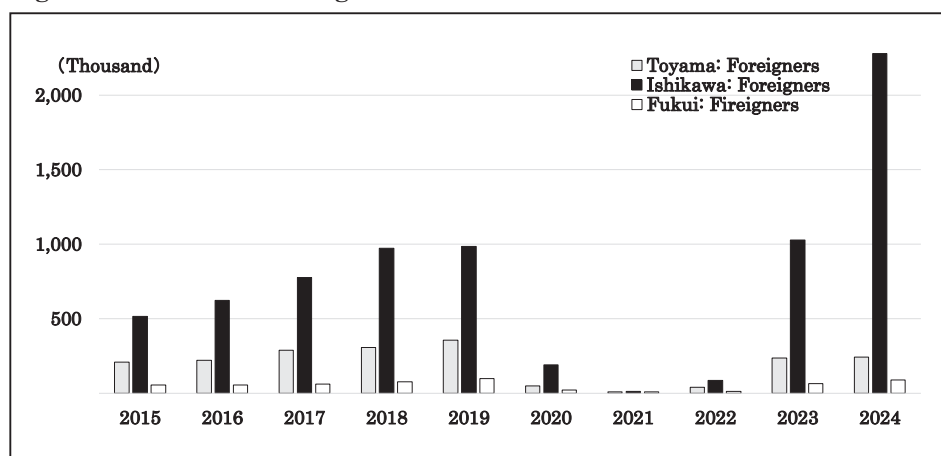
These analyses clearly indicate Ishikawa's outstanding growth and recovery from COVID-19 among the three prefectures. For Ishikawa, the commencement of Hokuriku Shinkansen bullet train from Kanazawa to Tsuruga in March 2024 was a positive factor for tourists, but the Noto Peninsula earthquake in January 2024 was a negative factor. As a result, the number of hotel guests in Ishikawa increased, although this number includes businesspeople and earthquake-related recovery workers.

Figure. 1 Number of Japanese Hotel Guests in Hokuriku



Reference: Japan Tourism Agency (2015-2025)

Figure. 2 Number of Foreign Hotel Guests in Hokuriku



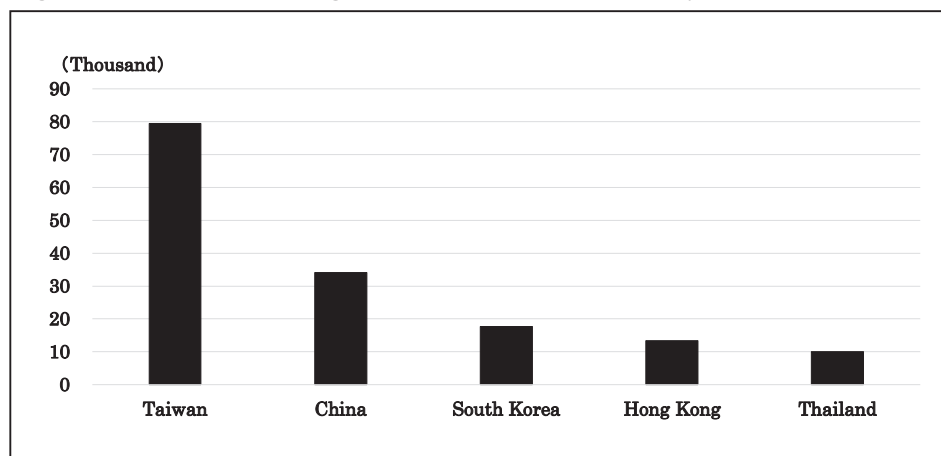
Reference: Japan Tourism Agency (2015-2025)

Table. 1 Number of Hotel Guests in Main Prefectures in 2024

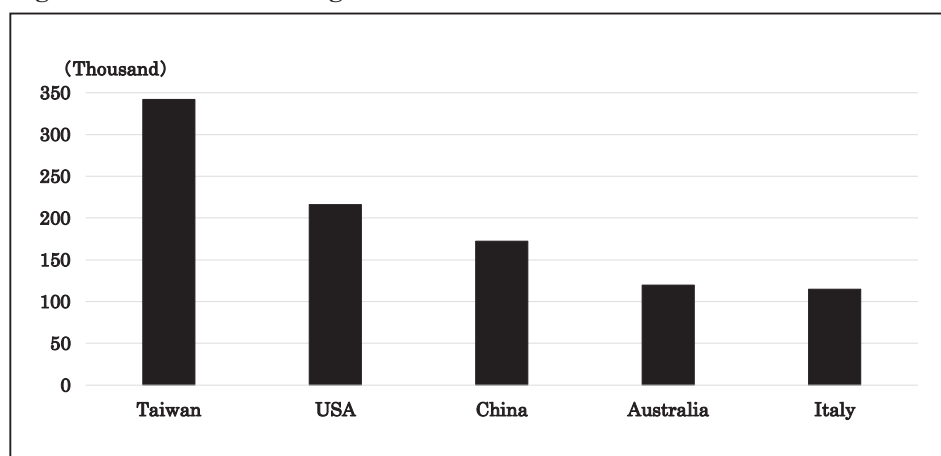
(Number of Hotel Guests: in thousands)

Prefectures	Japanese		Foreigners		Total	
	Hotel Guests	Rank	Hotel Guests	Rank	Hotel Guests	Rank
Tokyo	53,777	1	57,200	1	110,977	1
Osaka	31,119	3	25,336	2	56,455	2
Hokkai-do	32,366	2	9,652	4	42,018	3
Kyoto	16,555	9	16,613	3	33,169	4
Okinawa	24,612	4	7,328	5	31,940	5
Ishikawa	9,588	17	2,279	12	11,867	15
Toyama	3,434	39	243	36	3,677	37
Fukui	3,449	38	89	46	3,538	40

Reference: Japan Tourism Agency (2015-2025)

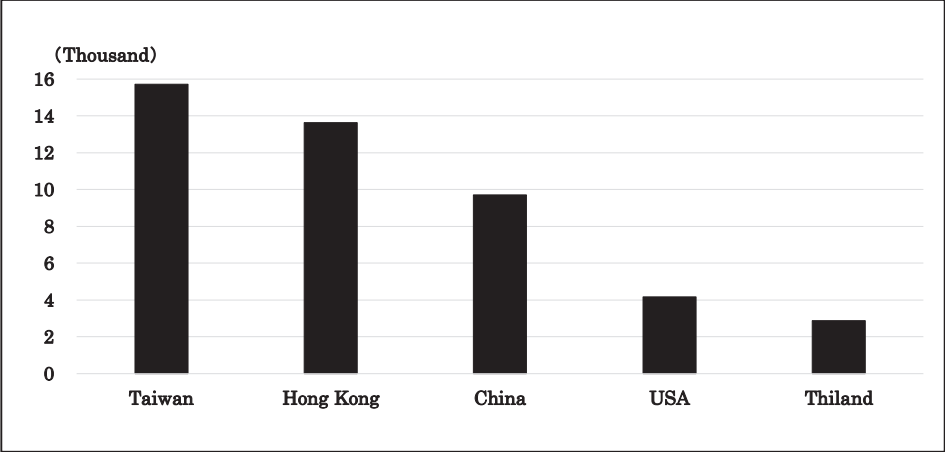
Figure. 3 Five Main Foreign Countries and Areas in Toyama in 2024

Reference: Japan Tourism Agency (2015-2025)

Figure. 4 Five Main Foreign Countries and Areas in Ishikawa in 2024

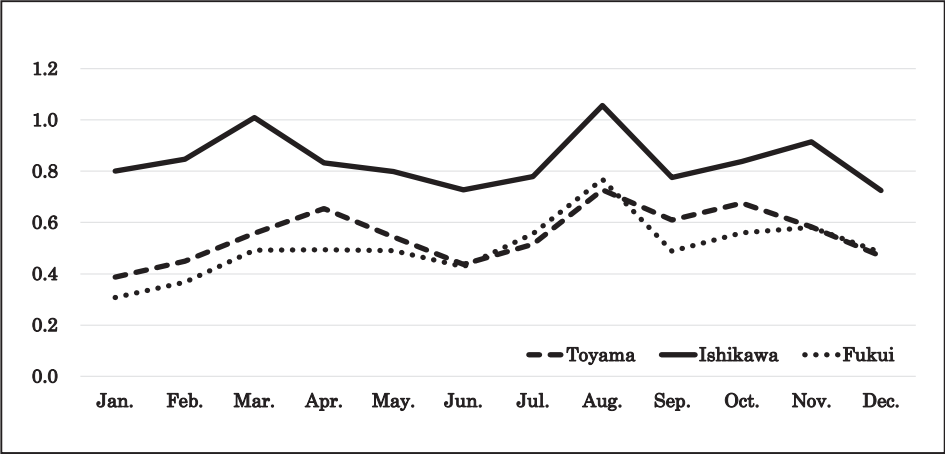
Reference: Japan Tourism Agency (2015-2025)

Figure. 5 Five Main Foreign Countries and Areas in Fukui in 2024



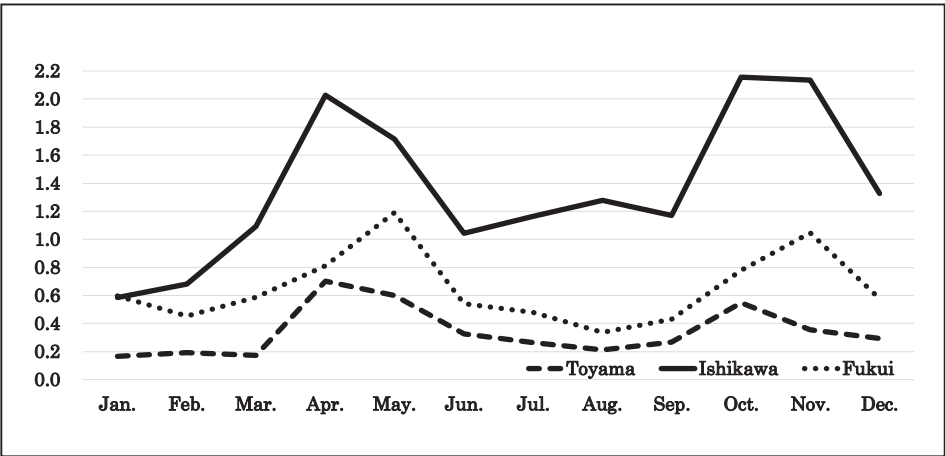
Reference: Japan Tourism Agency (2015-2025)

Figure. 6 Ratio of Number of Japanese Hotel Guests in Each Month in 2024 Compared with Ex-max Number from 2015 through 2023



Reference: Japan Tourism Agency (2015-2025)

Figure. 7 Ratio of Number of Foreign Hotel Guests in Each Month in 2024 Compared with Ex-max Number from 2015 through 2023



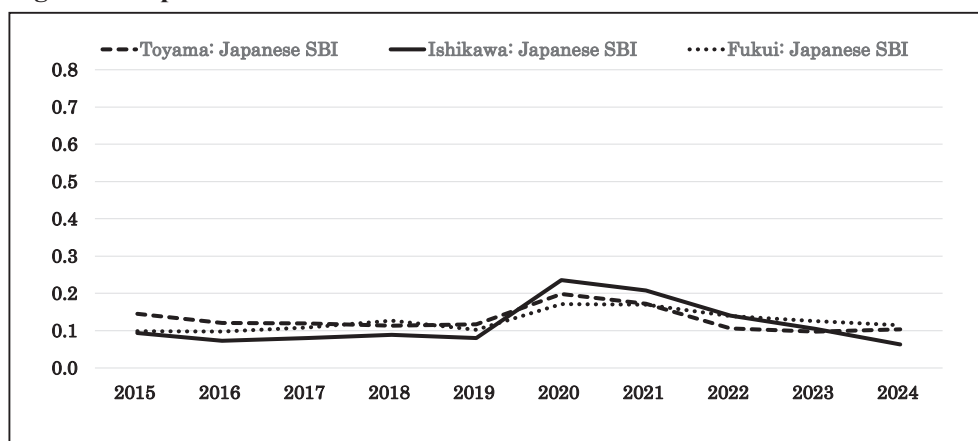
Reference: Japan Tourism Agency (2015-2025)

3. Seasonal Features of Hokuriku District

This study uses the “Gini Coefficient” technique, which is used to measure income distribution to statistically analyze the differences in the number of seasonal hotel guests in each prefecture. Accordingly, the trend of the changes and unbalances in the number of hotel guests through the year could be realized based on the chronological order, and it was attempted in both Japanese and foreigners differently. Based on Aoki (2023), this index is referred to as the “Seasonal Balance Index (SBI),” and ten years from 2015 to 2024 are used as the period of analysis. The documents and numbers surveyed by Japan Tourism Agency (2015-2025) are used.

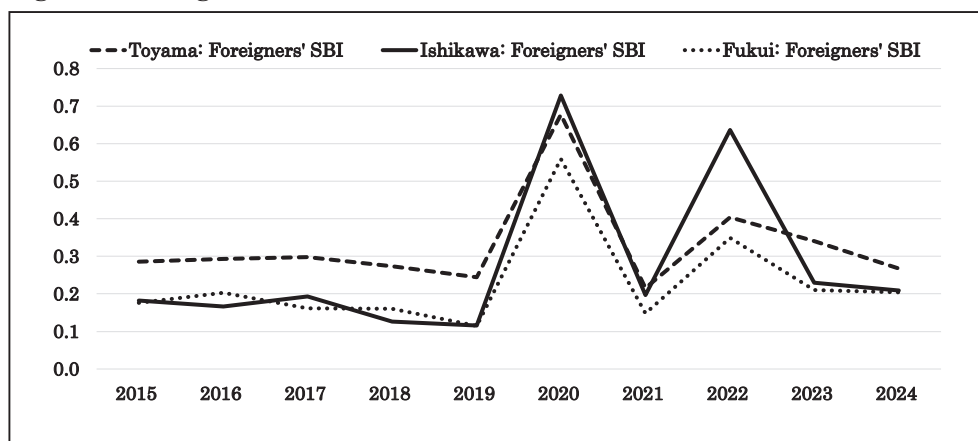
Figures 8 and 9 present the changes of SBI for Japanese and foreign hotel guests in each prefecture, respectively. An increase in SBI indicates worsening of the seasonal balances of the number of hotel guests. This means that there are relatively wide differences about them among months because SBI is the index to be able to express the concentration of the number of hotel guests in some specific months. In the case of Japanese hotel guests, the SBI increased at the time of COVID-19, which exerted a significant negative influence on tourism. At that time, the “GO TO Travel Campaign” policy, which encouraged local inhabitants to go to neighborhood spots and hotels, was implemented domestically, and the negative effects of

Figure. 8 Japanese SBIs in Hokuriku

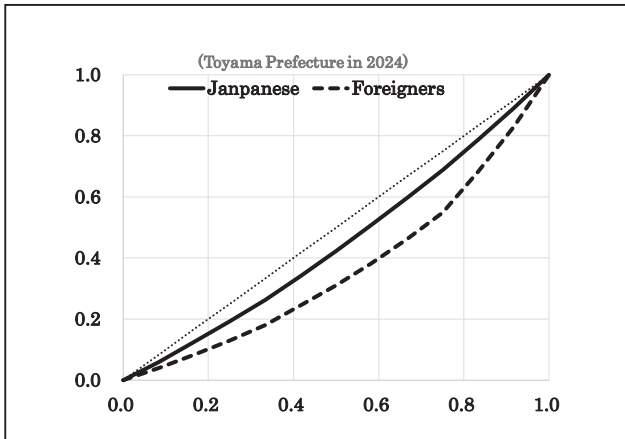


Reference: Japan Tourism Agency (2015-2025) and Author

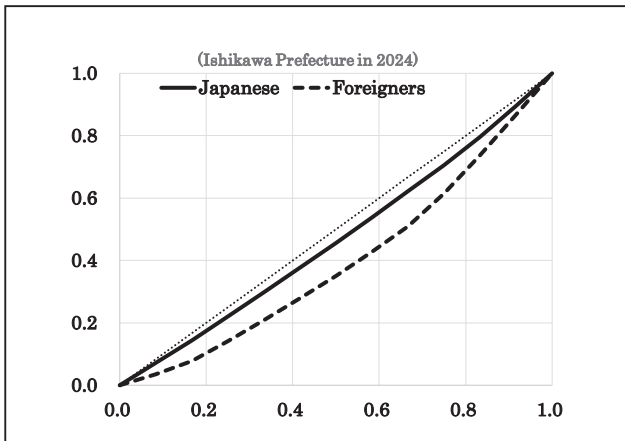
Figure. 9 Foreign SBIs in Hokuriku



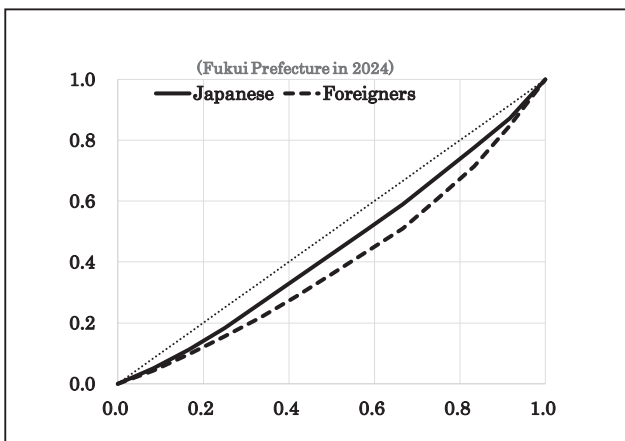
Reference: Japan Tourism Agency (2015-2025) and Author

Figure. 10 Lorenz Curve in 2024 in Toyama

Reference: Japan Tourism Agency (2015-2025) and Author

Figure. 11 Lorenz Curve in 2024 in Ishikawa

Reference: Japan Tourism Agency (2015-2025) and Author

Figure. 12 Lorenz Curve in 2024 in Fukui

Reference: Japan Tourism Agency (2015-2025) and Author

COVID-19 may have been reduced to some extent. Contrastingly, in the case of foreign hotel guests, the SBI exhibited a significant negative increase in 2020 and 2022, which may be due to the strict entry

restrictions to Japan at the time of COVID-19. The results for 2020 implied that some foreigners still came to Japan in winter but the number of hotel guests decreased considerably after March. The results for 2022 implied that some foreign tourists began to visit Japan again after autumn. Conversely, for 2021, as the number of hotel guests was very low throughout the year, the SBI was also low. After 2023, the relaxation of COVID-19-based restrictions led to a rapid increase in the number of foreign hotel guests. Some SBIs are not still as low as those before 2019, but there has been in the drop tendencies. However, the SBIs of the three prefectures are larger for foreign hotel guests than Japanese ones.

Figures 10, 11, and 12 present the Lorenz Curves in 2024 in each prefecture. As a common feature, the seasonal differences of the number of Japanese hotel guests in each prefecture are smaller than those of foreign hotel guests. In terms of differences in each prefecture, Ishikawa and Fukui have the smallest index for Japanese and foreigners, respectively.

4. Relationship between SBI and Number of Hotel Guests in Hokuriku District

When too many tourists visit the same area at the same time, concerns regarding overtourism arise. At the prefecture level, it could be said that it is too wide to realize overtourism directly, but considering that visitors do not come to a whole prefecture averagely but come to some specific areas of the prefecture intensively, it would have importance to some extent to analyze the degree of concentration about even a prefecture level. Accordingly, this section focuses on prefecture-level analysis. However, it might be important to think that when comparing the case

that a lot of tourists visit an area in a specifically crowded season and another case that a lot of them visit the area through all the season averagely, it would be considerably different as the accepting side (the region as a supply side) even if the total number of tourists is the same. In the latter case, perceived overtourism would be relatively lower. Therefore, as the next step, the relationship between the movement of SBI and the movement of the number of hotel guests should be analyzed.

Figures 13, 14, and 15 present the relationship between the number of Japanese and foreign hotel guests and SBI of the three prefectures in chronological order, respectively. To adjust the size of the number of hotel guests to roughly compare the three prefectures, the number of hotel guests in 2015 = 1 in each prefecture is supposed as a standard number respectively, and each number of other years is compared with that for 2015 (=1). A horizontal and vertical axis shows the changes of the number of hotel guests and SBI, respectively. This study infers that the greater the number of hotel guests that visit a prefecture, the better the positive effects (e.g., economic) in that period. However, if SBI is higher, the impact is negative due to a deterioration in seasonal balances of the number of hotel guests.

The analysis reveals two main features about each prefecture.

- 1) The chronological movements of Japanese hotel guests at the cross and vertical axes are relatively small.
- 2) The chronological movements of foreign hotel guests at the cross and vertical axes are relatively large.

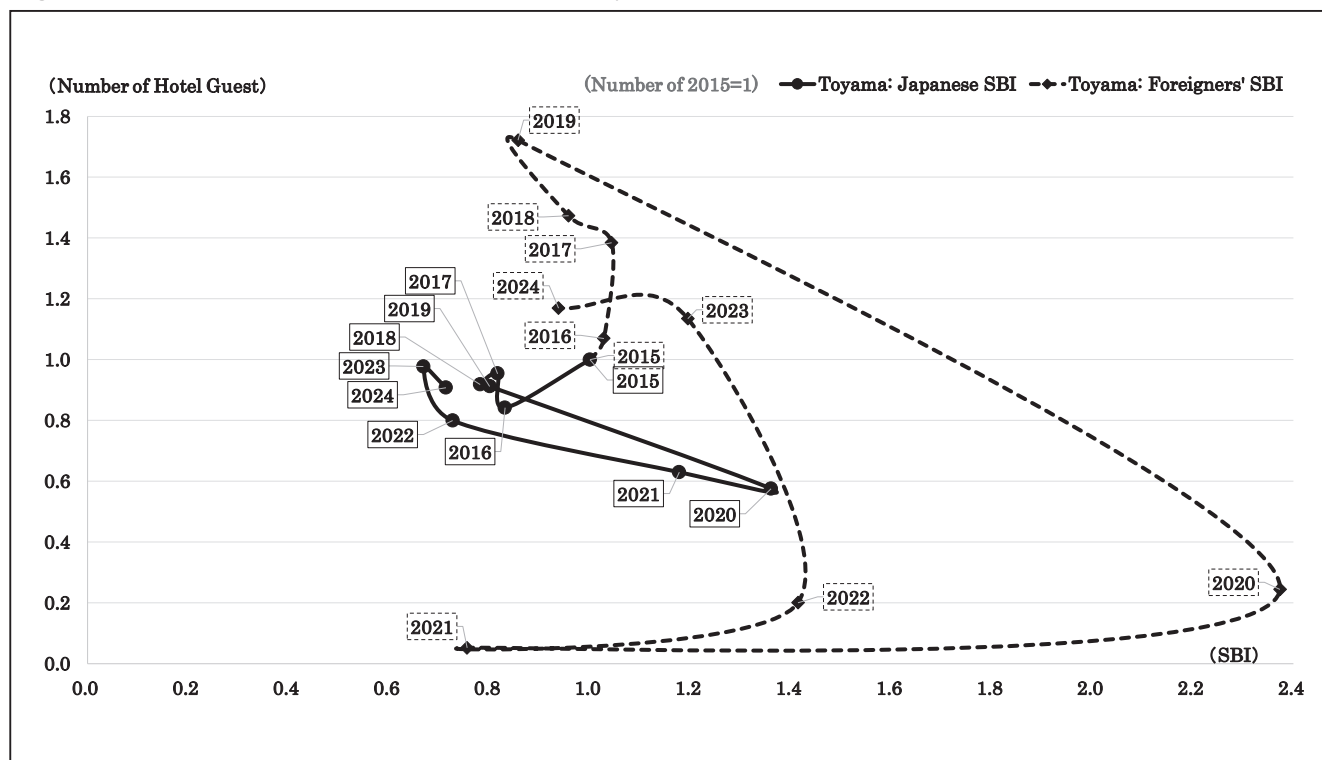
In each prefecture, the number of foreign hotel

guests is smaller than that of Japanese hotel guests, suggesting a seasonal trend for foreigners. In sum, Hokuriku District has a trend of seasonal tourism to specific sightseeing spots, which differs from some regions that attract tourists throughout the year.

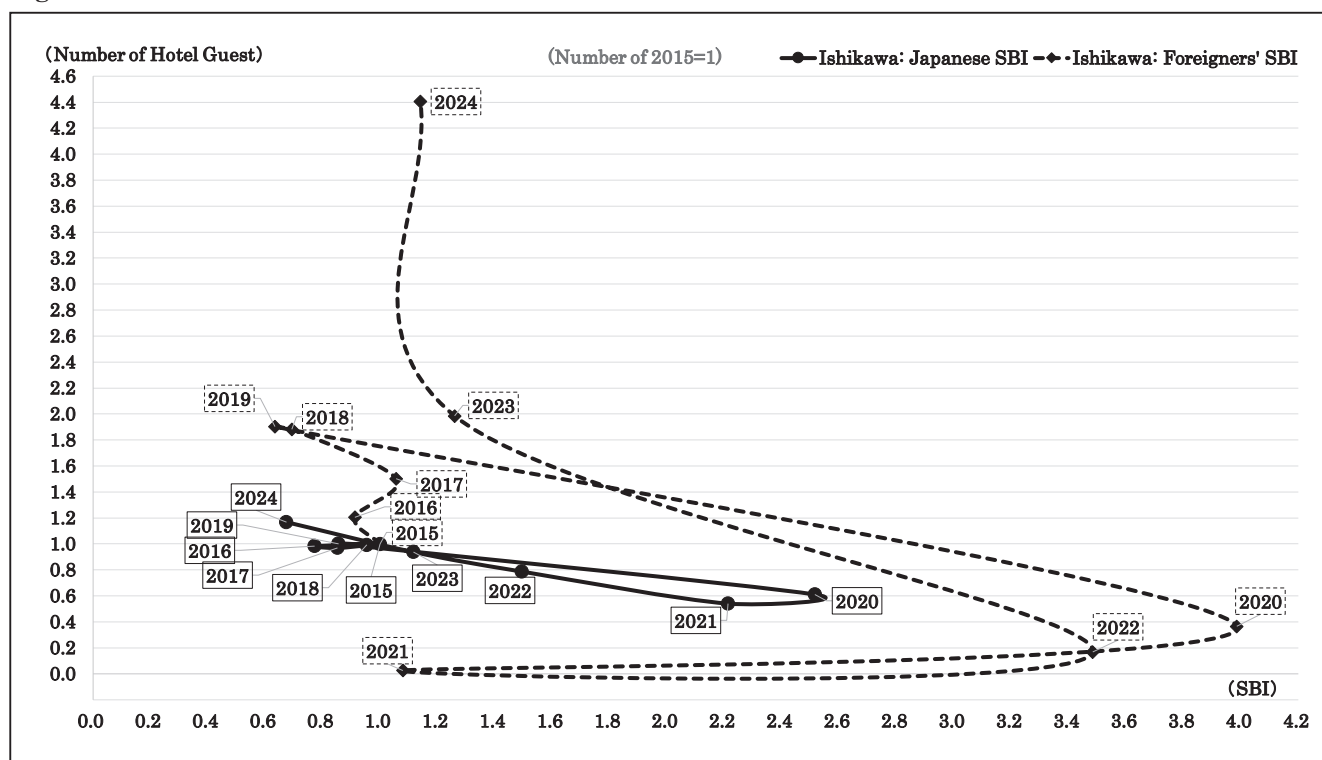
In terms of the features of each prefecture, the number of Japanese hotel guests only in Ishikawa exceeds 1, and both Toyama and Fukui have less than 1 in the case of 2024. The launch of Hokuriku Shinkansen bullet train from Nagano to Kanazawa in 2015 had a positive impact on tourism in the Hokuriku District, however, visitor numbers in Toyama and Fukui have returned to pre-launch levels, indicating a lack of residual effects. Contrastingly, the SBIs in the three prefectures exhibit relatively stable tendencies.

Regarding the number of foreign hotel guests, in 2019, the maximum numbers were observed in both Toyama and Fukui. Furthermore, the numbers in 2024 were lower than those in 2019, and SBIs were also larger than those in 2019, which indicates unfavorable trends in visitor numbers. Therefore, both prefectures need the more appropriate foreigners-accepting policy because they still have a possibility to accept more foreign tourists. In Ishikawa, the maximum number of foreign hotel guests was recorded in 2024, and SBI was larger than that of 2019, but not considerably. At present, whether such a tendency continues is still unknown, but there might be still a room of acceptance in each prefecture if that increase is made by a good seasonal balance.

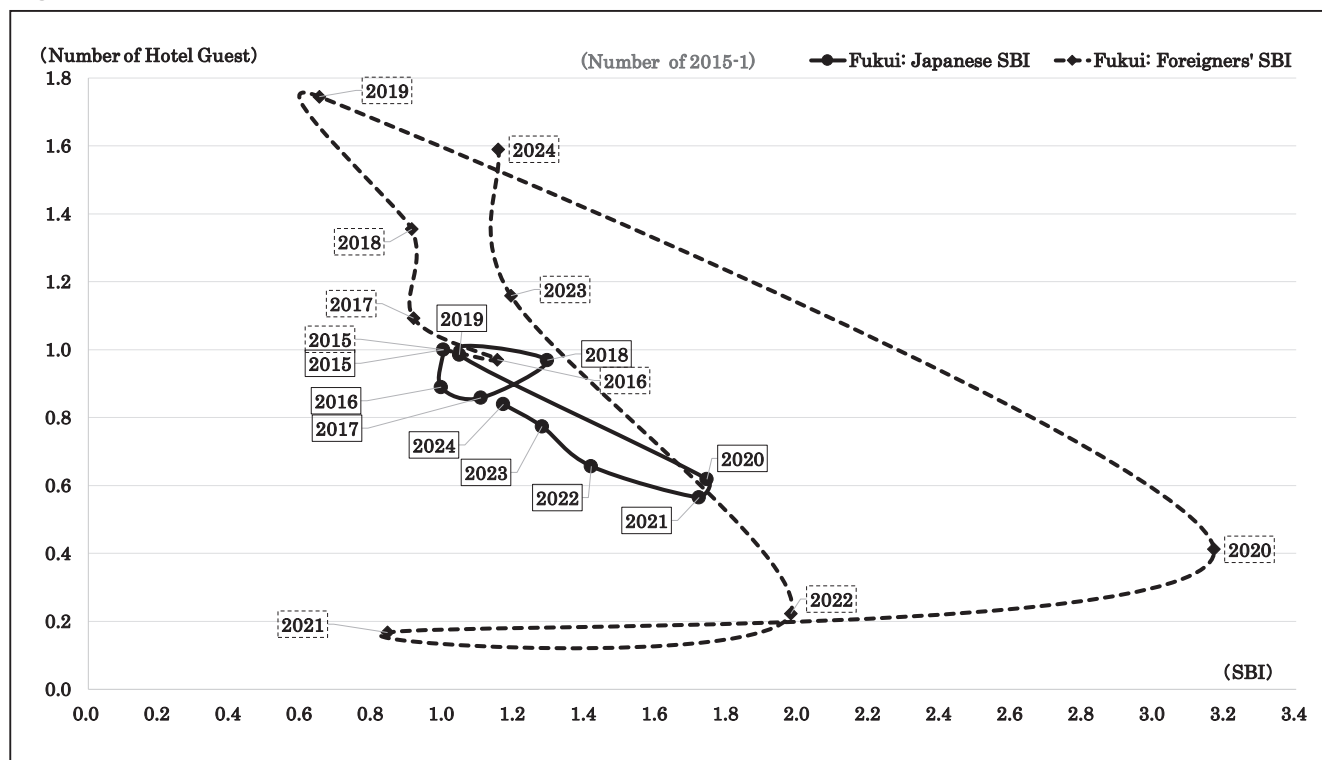
Thus, the total characteristic of three prefectures of Hokuriku District, including the time of COVID-19, is that Ishikawa's effective way of attracting visitors which means that both increase of the number of hotel guests and tendency of SBI's decline, and Toyama's

Figure. 13 Number of Hotel Guests and SBI in Toyama

Reference: Japan Tourism Agency (2015-2025) and Author

Figure. 14 Number of Hotel Guests and SBI in Ishikawa

Reference: Japan Tourism Agency (2015-2025) and Author

Figure. 15 Number of Hotel Guests and SBI in Fukui

Reference: Japan Tourism Agency (2015-2025) and Author

and Fukui's sluggish growth of attracting visitors. Therefore, the appropriate policies in the future would be as follows:

- 1) Ishikawa should implement policies aimed at strengthening tourist acceptance and attracting visitors, as well as to cope with overtourism.
- 2) Toyama and Fukui should focus on strategies to promote the recovery of the number of hotel guests, particularly foreign visitors.

In addition, the further reinforcement of the wide area cooperation among three prefectures is necessary because visitors do not usually pay attention to administrative areas such as prefectural boundaries.

5. Conclusion

This study mainly analyzed tourists-visiting balance between an on-season and off-season, which is

one of the major problems in the sightseeing industry. A case study based on the number of hotel guests in three prefectures of the Hokuriku District was analyzed. The results revealed the following main conclusions: 1) The SBI exhibited an improving trend in line with the increase in the number of both Japanese and foreign hotel guests in Ishikawa, especially after COVID-19. 2) In both Toyama and Fukui, sluggish growth was observed in the number of hotel guests and the SBI improved to some extent.

Therefore, the aim of the future policies for tourism would be different even if three prefectures are located in the same Hokuriku District. However, considering the wide dispersion of tourists in general, the cooperation of three prefectures is also important; therefore, the promotion of the effective policies about sightseeing action on the basis of such current situations should be pursued importantly by whole

three prefectures. In addition, it is necessary to analyze foreigners from each country and area separately because their ways to visit Japan are different, such as the stay days and their activities. So, each analysis would be important, too.

Notes

- 1) According to the Japan Tourism Agency (2015-2025), the number of total hotel guests was 595.9 million, which included 480.3 million (80.6%) and 115.7 million (19.4%) Japanese and foreigners in 2019, respectively. In 2024, the number of total hotel guests was 650.3 million, which included 486.7 million (74.8%) and 163.6 million (25.2%) Japanese and foreigners, respectively.
- 2) The number of foreign hotel guests is considered only for the institutions with 10 or more employees.

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