



Japan Fact Sheet

Japan Overview

The Hawai'i Tourism Authority selected a.link LLC for Brand Marketing and Management Services in Japan. In 2025, Hawai'i Tourism Japan (HTJ) builds on the momentum of previous campaigns by delving deeper into the distinct branding of each Hawaiian island and strengthening partnerships with industry stakeholders to drive bookings to Hawai'i.

Year-to-Date June 2025 Quick Facts^{1/}

Visitor Expenditures: \$470.4 million
Primary Purpose of Stay: Pleasure (280,644) vs. MCI (21,000)
Average Length of Stay: 5.99 days
First Time Visitors: 29.4%
Repeat Visitors: 70.6%

| JAPAN MMA (by Air) | 2019 | 2020 | 2021 | 2022 | 2023 | 2024RP | 2025 Annual Forecast* | YTD June 2025P | YTD June 2024RP | % Change |
|------------------------------------|-----------|-----------|---------|-----------|-----------|-----------|-----------------------------|-------------------|--------------------|----------|
| Visitor Expenditures (\$ Millions) | 2,248.3 | NA | 65.1 | 359.4 | 930.3 | 1,072.9 | 1,035.9 | 470.4 | 486.4 | -3.3% |
| Visitor Days | 9,306,767 | 1,719,843 | 294,720 | 1,526,608 | 3,864,472 | 4,475,301 | 4,244,936 | 1,912,197 | 2,039,047 | -6.2% |
| Arrivals | 1,576,205 | 289,137 | 18,936 | 192,562 | 589,172 | 723,818 | 695,891 | 319,474 | 329,892 | -3.2% |
| Average Daily Census | 25,498 | 4,699 | 807 | 4,182 | 10,588 | 12,228 | 11,630 | 10,565 | 11,204 | -5.7% |
| Per Person Per Day Spending (\$) | 241.6 | NA | 220.9 | 235.4 | 240.7 | 239.7 | 244.0 | 246.0 | 238.5 | 3.1% |
| Per Person Per Trip Spending (\$) | 1,426.4 | NA | 3,438.8 | 1,866.4 | 1,578.9 | 1,482.2 | 1,488.7 | 1,472.5 | 1,474.4 | -0.1% |
| Length of Stay (days) | 5.90 | 5.95 | 15.56 | 7.93 | 6.56 | 6.18 | 6.10 | 5.99 | 6.18 | -3.2% |

NA= Comparative annual 2020 visitor spending statistics were not available, as the Departure Survey could not be conducted between April to October 2020 due to COVID-19 restrictions.

*Department of Business, Economic Development & Tourism (DBEDT) 2025 annual forecast (Quarter 2, 2025).

P=Preliminary data. RP=March and April 2024 preliminary data were revised.

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^{1/} 2024P and 2025P visitor data are preliminary. 2019 - 2023 visitor data are the final numbers and reflect updated airfare statistics from DIIO Mi Airline database, data from the National Travel and Tourism Office, and final passenger counts from Airline Traffic Summary reports.

Market Summary

- In the first half of 2025, there were 319,474 visitors from Japan, compared to 329,892 visitors (-3.2%) in the first half of 2024 and 734,235 visitors (-56.5%) in the first half of pre-pandemic 2019. Visitors from Japan spent \$470.4 million in the first half of 2025, compared to \$486.4 million (-3.3%) in the first half of 2024 and \$1.03 billion (-54.4%) in the first half of 2019. Daily visitor spending in the first half of 2025 (\$246 per person) increased compared to the first half of 2024 (\$239 per person, +3.1%) and the first half of 2019 (\$241 per person, +2.1%).
- In calendar year 2024, there were 723,818 visitors from Japan, compared to 589,172 visitors in 2023 and 1,576,205 visitors in 2019. Visitors from Japan spent \$1.07 billion in 2024, compared to \$930.3 million in 2023 and \$2.25 billion in 2019. Daily visitor spending in 2024 (\$240 per person) went down slightly from 2023 (\$241 per person) and 2019 (\$242 per person).
- There were 2,195 scheduled flights with 622,623 seats from Japan in the first half of 2025. Air capacity decreased compared to the first half of 2024 (2,370 flights, -7.4% with 694,630 seats, -10.4%) and the first half of 2019 (3,907 flights, -43.8% with 981,290 seats, -36.6%).
- In 2024, 4,734 scheduled flights with 1,384,265 seats serviced Hawai'i from Japan. In 2023, there were 3,823 scheduled flights with 1,063,623 seats. In 2019, there were 7,696 scheduled flights with 1,999,204 seats.

Market Conditions (Updated Quarterly)

- On April 22, 2025, the Japanese yen briefly hit a seven-month high at 139 against the U.S. dollar, driven by investor anticipation of lower U.S. interest rates.
- In March 2025, around 1,423,400 Japanese traveled overseas, a 16.7 percent increase from the previous year, reaching 73.8 percent of pre-COVID levels. Narita Airport saw 3.05 million international passengers, or 95 percent of March 2019 levels, with 924,000 being Japanese passengers, 17 percent higher than the previous year and 65 percent of 2019 levels. For the second consecutive month, Japanese passenger numbers exceeded 60 percent of 2019 figures, signaling a gradual recovery in overseas travel demand, especially for short-haul Asian routes.
- A survey by Hankyu Travel International revealed that 51 percent of respondents plan to travel during summer vacation (late July to late August), nearly double the 26 percent planning trips during Golden Week (late April to early May). The main reason for summer travel was the ability to take longer vacations (54%).
- A survey by JTB Tourism Research & Consulting on "Life and Travel of Generation Z" found that Gen Z males (18-29 years old) are more interested in solo travel, traveling to pursue hobbies, and visiting Instagram-worthy locations. This suggests they prioritize personal time and staying connected with trends. In contrast, Gen Z females are more likely to travel for dining experiences, visit famous sightseeing spots, and explore SNS-attractive places, reflecting their desire to enjoy time with family and friends.

- Australia has made significant investments in the Japanese market through targeted campaigns, leading to a notable increase in its appeal among Japanese travelers. In 2024, the Cairns Tourism Bureau reported a 96 percent recovery compared to 2019. Contributing factors include a favorable exchange rate (1 AUD = 93 yen), the absence of a tipping culture, and expanded travel options beyond direct flights.
- In celebration of Lei Day, the #Love Hawai'i campaign was launched in partnership with Hawaiian Airlines, Outrigger Resorts & Hotels, and Cirque du Soleil 'Auana. The campaign will select two groups (four individuals total) via lottery to win a prize package including round-trip economy class tickets on Hawaiian Airlines, a three-night stay at Outrigger Waikiki Beachcomber Hotel, and tickets to Cirque du Soleil 'Auana.
- ANA and JAL have announced a reduction in fuel surcharges for tickets issued in June and July 2025. The one-way surcharge will be 40,800 yen for ANA and 37,000 yen for JAL.
- JAL held a limited-time international flight sale from April 16 to 23, 2025, offering travel from April 16, 2024, to March 31, 2026, with fares for the Japan-Honolulu route starting at ¥87,000.

Distribution by Island

| JAPAN MMA (by Air) | 2019 | 2020 | 2021 | 2022 | 2023 | 2024RP | YTD June 2025P | YTD June 2024RP | % Change |
|--------------------|-----------|---------|--------|---------|---------|---------|----------------|-----------------|----------|
| O'ahu | 1,492,753 | 269,402 | 18,001 | 186,609 | 573,719 | 708,375 | 311,802 | 322,405 | -3.3% |
| Maui County | 48,524 | 8,265 | 775 | 5,710 | 11,927 | 14,442 | 6,943 | 6,833 | 1.6% |
| Maui | 46,684 | 7,929 | 766 | 5,408 | 11,383 | 13,769 | 6,746 | 6,403 | 5.4% |
| Moloka'i | 1,941 | 416 | 16 | 179 | 587 | 695 | 194 | 459 | -57.7% |
| Lāna'i | 2,300 | 128 | 19 | 301 | 489 | 406 | 253 | 216 | 17.2% |
| Kaua'i | 25,333 | 3,622 | 361 | 2,958 | 5,885 | 7,089 | 3,319 | 3,234 | 2.6% |
| Island of Hawai'i | 170,686 | 35,453 | 1,000 | 15,510 | 44,758 | 47,069 | 20,334 | 22,016 | -7.6% |

P=Preliminary data. RP=March and April 2024 preliminary data were revised.

Airlift: Scheduled Seats and Flights

| Scheduled seats | 2024 | | | | | 2023 | | | | | %CHANGE | | | | |
|-----------------|----------------|----------------|----------------|----------------|------------------|----------------|----------------|----------------|----------------|------------------|--------------|-------------|-------------|-------------|-------------|
| | Q1 | Q2 | Q3 | Q4 | Annual | Q1 | Q2 | Q3 | Q4 | Annual | Q1 | Q2 | Q3 | Q4 | Annual |
| JAPAN | 301,281 | 321,342 | 348,074 | 335,214 | 1,305,911 | 354,143 | 340,487 | 353,098 | 336,537 | 1,384,265 | -14.9 | -5.6 | -1.4 | -0.4 | -5.7 |
| Fukuoka | 10,842 | 10,842 | 10,842 | 11,120 | 43,646 | 10,842 | 10,842 | 11,676 | 10,842 | 44,202 | 0.0 | 0.0 | -7.1 | 2.6 | -1.3 |
| Nagoya | 12,189 | 12,428 | 20,315 | 21,988 | 66,920 | 12,428 | 12,428 | 12,428 | 12,667 | 49,951 | -1.9 | 0.0 | 63.5 | 73.6 | 34.0 |
| Osaka | 40,316 | 40,833 | 46,369 | 47,564 | 175,082 | 40,833 | 40,833 | 41,350 | 41,350 | 164,366 | -1.3 | 0.0 | 12.1 | 15.0 | 6.5 |
| Tokyo HND | 126,908 | 135,888 | 137,632 | 137,654 | 538,082 | 139,628 | 129,186 | 133,062 | 130,702 | 532,578 | -9.1 | 5.2 | 3.4 | 5.3 | 1.0 |
| Tokyo NRT | 111,026 | 121,351 | 132,916 | 116,888 | 482,181 | 150,412 | 147,198 | 154,582 | 140,976 | 593,168 | -26.2 | -17.6 | -14.0 | -17.1 | -18.7 |

| Scheduled flights | 2024 | | | | | 2023 | | | | | %CHANGE | | | | |
|-------------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|-------------|-------------|------------|-------------|
| | Q1 | Q2 | Q3 | Q4 | Annual | Q1 | Q2 | Q3 | Q4 | Annual | Q1 | Q2 | Q3 | Q4 | Annual |
| JAPAN | 1,064 | 1,131 | 1,209 | 1,154 | 4,558 | 1,212 | 1,158 | 1,214 | 1,150 | 4,734 | -12.2 | -2.3 | -0.4 | 0.3 | -3.7 |
| Fukuoka | 39 | 39 | 39 | 40 | 157 | 39 | 39 | 42 | 39 | 159 | 0.0 | 0.0 | -7.1 | 2.6 | -1.3 |
| Nagoya | 51 | 52 | 85 | 92 | 280 | 52 | 52 | 52 | 53 | 209 | -1.9 | 0.0 | 63.5 | 73.6 | 34.0 |
| Osaka | 154 | 156 | 179 | 184 | 673 | 156 | 156 | 158 | 158 | 628 | -1.3 | 0.0 | 13.3 | 16.5 | 7.2 |
| Tokyo HND | 512 | 545 | 552 | 552 | 2,161 | 558 | 521 | 535 | 527 | 2,141 | -8.2 | 4.6 | 3.2 | 4.7 | 0.9 |
| Tokyo NRT | 308 | 339 | 354 | 286 | 1,287 | 407 | 390 | 427 | 373 | 1,597 | -24.3 | -13.1 | -17.1 | -23.3 | -19.4 |

Source: DBEDT analysis from Diio Mi seat and flight schedules as of July 24, 2025, subject to change.

Group vs. True Independent; Leisure vs. Business

| JAPAN MMA (by Air) | 2019 | 2020 | 2021 | 2022 | 2023 | 2024RP | YTD June 2025P | YTD June 2024RP | % Change |
|---------------------------------|-----------|---------|--------|---------|---------|---------|----------------|-----------------|----------|
| Group vs True Independent (Net) | | | | | | | | | |
| Group Tour | 246,490 | NA | 204 | 12,941 | 73,690 | 99,269 | 42,685 | 40,727 | 4.8% |
| True Independent (Net) | 594,917 | NA | 18,155 | 143,576 | 339,436 | 391,676 | 164,936 | 175,992 | -6.3% |
| Leisure vs Business | | | | | | | | | |
| Pleasure (Net) | 1,360,644 | 247,980 | 13,254 | 158,823 | 505,037 | 607,054 | 280,644 | 286,905 | -2.2% |
| MCI (Net) | 85,595 | 18,464 | 563 | 8,542 | 41,150 | 53,562 | 21,000 | 19,233 | 9.2% |
| Convention/Conf. | 12,527 | 3,983 | 135 | 2,214 | 4,790 | 4,781 | 2,696 | 2,129 | 26.7% |
| Corp. Meetings | 4,068 | 951 | 368 | 981 | 1,911 | 1,400 | 580 | 643 | -9.8% |
| Incentive | 70,254 | 13,922 | 75 | 5,712 | 34,969 | 47,560 | 17,999 | 16,518 | 9.0% |

NA = Visit Status/Travel Method data statistics were not available from May – October 2020 as a result of limited fielding due to COVID-19 restrictions.

P=Preliminary data. RP=March and April 2024 preliminary data were revised.

First Timers vs. Repeat Visitors

| JAPAN MMA (by Air) | 2019 | 2020 | 2021 | 2022 | 2023 | 2024RP | YTD June 2025P | YTD June 2024RP | % Change |
|-------------------------|------|------|------|------|------|--------|----------------|-----------------|----------|
| First Time Visitors (%) | 31.7 | NA | 14.2 | 21.4 | 26.0 | 27.8 | 29.4 | 28.8 | 0.6 |
| Repeat Visitors (%) | 68.3 | NA | 85.8 | 78.6 | 74.0 | 72.2 | 70.6 | 71.2 | -0.6 |

NA = Visit Status/Travel Method data statistics were not available from May – October 2020 as a result of limited fielding due to COVID-19 restrictions.

P=Preliminary data. RP=March and April 2024 preliminary data were revised.

Tax Revenue

| JAPAN MMA (by Air) | 2019 | 2020 | 2021 | 2022 | 2023 | 2024RP | YTD June 2025P | YTD June 2024RP | % Change |
|---|--------|------|------|-------|--------|--------|----------------|-----------------|----------|
| State tax revenue generated (\$ Millions) ^{2/} | 262.43 | NA | 7.60 | 41.69 | 107.91 | 124.45 | 54.57 | 56.42 | -3.3% |

^{2/}State government tax revenue generated (direct, indirect, and induced).

P=Preliminary data. RP=March and April 2024 preliminary data were revised.