



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 February 2025 Quick Facts^{1/}

Visitor Expenditures: \$151.4 million
 Primary Purpose of Stay: Pleasure (91,222) vs. MCI (5,596)
 Average Length of Stay: 6.01 days
 First Time Visitors: 28.8%
 Repeat Visitors: 71.2%

JAPAN MMA (by Air)	2019	2020	2021	2022	2023	2024P	2025 Annual Forecast*	YTD Feb. 2025P	YTD Feb. 2024P	% Change
Visitor Expenditures (\$ Millions)	2,248.3	NA	65.1	359.4	930.3	1,067.8	1,139.7	151.4	160.8	-5.9%
Visitor Days	9,306,767	1,719,843	294,720	1,526,608	3,864,472	4,454,166	4,670,004	615,368	667,887	-7.9%
Arrivals	1,576,205	289,137	18,936	192,562	589,172	720,488	765,574	102,328	108,627	-5.8%
Average Daily Census	25,498	4,699	807	4,182	10,588	12,170	12,795	10,430	11,131	-6.3%
Per Person Per Day Spending (\$)	241.6	NA	220.9	235.4	240.7	239.7	244.1	246.0	240.8	2.1%
Per Person Per Trip Spending (\$)	1,426.4	NA	3,438.8	1,866.4	1,578.9	1,482.1	1,488.7	1,479.1	1,480.6	-0.1%
Length of Stay (days)	5.90	5.95	15.56	7.93	6.56	6.18	6.10	6.01	6.15	-2.2%

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 1, 2025).

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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

- There were 102,328 visitors from Japan in the first two months of 2025, which was a decrease from the first two months of 2024 (108,627 visitors, -5.8%) and the first two months of pre-pandemic 2019 (241,071 visitors, -57.6%). Visitors from Japan spent \$151.4 million in the first two months of 2025, compared to \$160.8 million (-5.9%) in the first two months of 2024 and \$338.9 million (-55.3%) in the first two months of 2019. Daily spending by Japanese visitors in the first two months of 2025 (\$246 per person) increased compared to the first two months of 2024 (\$241 per person, +2.1%) and the first two months of 2019 (\$241 per person, +2.1%).
- In calendar year 2024, there were 720,488 visitors from Japan, compared to 589,172 visitors (+22.3%) in 2023. Japanese arrivals in 2024 represent a 45.7 percent recovery rate from pre-pandemic 2019 (1,576,205 visitors, -54.3%). Visitors from Japan spent \$1.07 billion in 2024, compared to \$930.3 million (+14.8%) in 2023 and \$2.25 billion (-52.5%) in 2019. Daily visitor spending in 2024 (\$240 per person) went down slightly from 2023 (\$241 per person, -0.4%) and 2019 (\$242 per person, -0.8%).
- There were 695 scheduled flights with 197,207 seats from Japan in the first two months of 2025. Air capacity decreased (788 flights, -11.8% with 230,392 seats, -14.4%) compared to the first two months of 2024 and the first two months of 2019 (1,328 flights, -47.7% with 332,260 seats, -40.6%).
- In 2024, 4,734 scheduled flights with 1,384,265 seats serviced Hawai'i from Japan. In 2023, there were 3,823 scheduled flights (+23.8%) with 1,063,623 seats (+30.1%). In 2019, there were 7,696 scheduled flights (-38.5%) with 1,999,204 seats (-30.8%).

Market Conditions

- In its January 2025 report, the Japanese government described the economy as "showing gradual recovery, although some stagnation remains." The GDP for the October-December 2024 period is expected to grow by 0.5 percent year-over-year (2.1% annualized), marking positive growth for the third consecutive quarter. Private consumption saw a slight increase, while capital investment remained stable. Foreign demand also contributed to growth, with exports rising and imports falling compared to the previous quarter.
- JTB's 2025 travel forecast predicts 14.1 million overseas travelers, 108.5 percent of 2024 and 70.3 percent of 2019 levels. Average expenditure per traveler is estimated at 334,100 yen, a 6.2 percent increase from 2024 and 40.9 percent higher than 2019. Total overseas travel expenditure is projected to reach 4.71 trillion yen, a 15.2 percent increase from 2024 and 1.3 percent lower than 2019. A survey reveals 21.1 percent of people plan to travel abroad in 2025, up from 8.7 percent in 2024. Popular destinations include South Korea, Taiwan, Hawai'i, and Europe.
- Delta Air Lines has announced an increase in fuel surcharges for tickets issued between February and March 2025. For flights to Hawai'i, the surcharge for a one-way trip will be ¥18,500, rising by ¥2,500 from the current rate.
- Hawaiian Airlines has started accepting surfboards and bicycles as standard checked baggage, alongside golf bags and other sports equipment. Previously, surfboards and similar items weighing up to 23 kg and measuring no more than 292 cm (sum of dimensions) incurred an excess baggage fee of 11,000 yen or 75 U.S. dollars on Japan routes. This change coincides with the launch of the "Huaka'i by Hawaiian" program for Hawai'i residents and extends to connecting flights with Alaska Airlines.

- ANA and the bridal media outlet "Zexy" are collaborating on a project tentatively named the "Hawai'i Wedding Support Project" to promote overseas weddings, specifically targeting individuals discouraged by the increasing cost of travel in recent years. HTJ is currently assessing ways to participate in and contribute to this initiative.

Distribution by Island

JAPAN MMA (by Air)	2019	2020	2021	2022	2023	2024P	YTD Feb. 2025P	YTD Feb. 2024P	% Change
O'ahu	1,492,753	269,402	18,001	186,609	573,719	705,163	99,919	106,117	-5.8%
Maui County	48,524	8,265	775	5,710	11,927	14,382	2,328	2,276	2.3%
Maui	46,684	7,929	766	5,408	11,383	13,711	2,280	1,993	14.4%
Moloka'i	1,941	416	16	179	587	695	53	307	-82.9%
Lāna'i	2,300	128	19	301	489	403	88	14	539.1%
Kaua'i	25,333	3,622	361	2,958	5,885	7,057	948	1,029	-7.8%
Island of Hawai'i	170,686	35,453	1,000	15,510	44,758	46,677	5,657	6,804	-16.9%

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	301,929	314,194	346,792	348,525	1,311,440	354,143	340,487	353,098	336,537	1,384,265	-14.7	-7.7	-1.8	3.6	-5.3
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	127,556	136,136	137,632	137,632	538,956	139,628	129,186	133,062	130,702	532,578	-8.6	5.4	3.4	5.3	1.2
Tokyo NRT	111,026	113,955	131,634	130,221	486,836	150,412	147,198	154,582	140,976	593,168	-26.2	-22.6	-14.8	-7.6	-17.9

Scheduled flights	2024					2023					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
JAPAN	1,067	1,106	1,202	1,221	4,596	1,212	1,158	1,214	1,150	4,734	-12.0	-4.5	-1.0	6.2	-2.9
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	515	546	552	552	2,165	558	521	535	527	2,141	-7.7	4.8	3.2	4.7	1.1
Tokyo NRT	308	313	347	353	1,321	407	390	427	373	1,597	-24.3	-19.7	-18.7	-5.4	-17.3

Source: DBEDT analysis from Diio Mi seat and flight schedules as of February 21, 2025, subject to change.

Group vs. True Independent; Leisure vs. Business

JAPAN MMA (by Air)	2019	2020	2021	2022	2023	2024P	YTD Feb. 2025P	YTD Feb. 2024P	% Change
Group vs True Independent (Net)									
Group Tour	246,490	NA	204	12,941	73,690	98,923	11,304	13,234	-14.6%
True Independent (Net)	594,917	NA	18,155	143,576	339,436	389,758	53,199	58,347	-8.8%
Leisure vs Business									
Pleasure (Net)	1,360,644	247,980	13,254	158,823	505,037	604,054	91,222	94,416	-3.4%
MCI (Net)	85,595	18,464	563	8,542	41,150	53,423	5,596	6,989	-19.9%
Convention/Conf.	12,527	3,983	135	2,214	4,790	4,761	822	374	120.0%
Corp. Meetings	4,068	951	368	981	1,911	1,396	221	169	31.2%
Incentive	70,254	13,922	75	5,712	34,969	47,445	4,639	6,451	-28.1%

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.

First Timers vs. Repeat Visitors

JAPAN MMA (by Air)	2019	2020	2021	2022	2023	2024P	YTD Feb. 2025P	YTD Feb. 2024P	% Change
First Time Visitors (%)	31.7	NA	14.2	21.4	26.0	27.8	28.8	27.4	1.3
Repeat Visitors (%)	68.3	NA	85.8	78.6	74.0	72.2	71.2	72.6	-1.3

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.

Tax Revenue

JAPAN MMA (by Air)	2019	2020	2021	2022	2023	2024P	YTD Feb. 2025P	YTD Feb. 2024P	% Change
State tax revenue generated (\$ Millions) ^{2/}	262.43	NA	7.60	41.69	107.91	123.87	17.56	18.66	-5.9%

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