



# 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 May 2025 Quick Facts<sup>1/</sup>

Visitor Expenditures: \$387.8 million  
Primary Purpose of Stay: Pleasure (232,568) vs. MCI (16,277)  
Average Length of Stay: 6.01 days  
First Time Visitors: 28.6%  
Repeat Visitors: 71.4%

JAPAN MMA (by Air)	2019	2020	2021	2022	2023	2024RP	2025 Annual Forecast*	YTD May 2025P	YTD May 2024RP	% Change
Visitor Expenditures (\$ Millions)	2,248.3	NA	65.1	359.4	930.3	1,072.9	1,139.7	387.8	399.1	-2.8%
Visitor Days	9,306,767	1,719,843	294,720	1,526,608	3,864,472	4,475,301	4,670,004	1,575,468	1,670,543	-5.7%
Arrivals	1,576,205	289,137	18,936	192,562	589,172	723,818	765,574	262,185	270,018	-2.9%
Average Daily Census	25,498	4,699	807	4,182	10,588	12,228	12,795	10,434	10,990	-5.1%
Per Person Per Day Spending (\$)	241.6	NA	220.9	235.4	240.7	239.7	244.1	246.1	238.9	3.0%
Per Person Per Trip Spending (\$)	1,426.4	NA	3,438.8	1,866.4	1,578.9	1,482.2	1,488.7	1,479.0	1,478.0	0.1%
Length of Stay (days)	5.90	5.95	15.56	7.93	6.56	6.18	6.10	6.01	6.19	-2.9%

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).

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

## Contact Information

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<sup>1/</sup> 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

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- In the first five months of 2025, there were 262,185 visitors from Japan, compared to 270,018 visitors (-2.9%) in the first five months of 2024 and 607,643 visitors (-56.9%) in the first five months of pre-pandemic 2019. Visitors from Japan spent \$387.8 million in the first five months of 2025, compared to \$399.1 million (-2.8%) in the first five months of 2024 and \$850.4 million (-54.4%) in the first five months of 2019. Daily visitor spending in the first five months of 2025 (\$246 per person) increased compared to the first five months of 2024 (\$239 per person, +3.0%) and the first five months of 2019 (\$239 per person, +2.8%).
- 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 1,839 scheduled flights with 519,927 seats from Japan in the first five months of 2025. Air capacity decreased compared to the first five months of 2024 (1,985 flights, -7.4% with 581,888 seats, -10.6%) and the first five months of 2019 (3,297 flights, -44.2% with 825,902 seats, -37.0%).
- 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)

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- 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 May 2025P	YTD May 2024RP	% Change
O'ahu	1,492,753	269,402	18,001	186,609	573,719	708,375	255,584	263,796	-3.1%
Maui County	48,524	8,265	775	5,710	11,927	14,442	5,635	5,471	3.0%
Maui	46,684	7,929	766	5,408	11,383	13,769	5,490	5,150	6.6%
Moloka'i	1,941	416	16	179	587	695	149	400	-62.6%
Lāna'i	2,300	128	19	301	489	406	201	124	61.3%
Kaua'i	25,333	3,622	361	2,958	5,885	7,089	2,555	2,645	-3.4%
Island of Hawai'i	170,686	35,453	1,000	15,510	44,758	47,069	16,706	18,163	-8.0%

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
<b>JAPAN</b>	<b>301,281</b>	<b>314,224</b>	<b>346,792</b>	<b>348,525</b>	<b>1,310,822</b>	<b>354,143</b>	<b>340,487</b>	<b>353,098</b>	<b>336,537</b>	<b>1,384,265</b>	<b>-14.9</b>	<b>-7.7</b>	<b>-1.8</b>	<b>3.6</b>	<b>-5.3</b>
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	136,166	137,632	137,632	538,338	139,628	129,186	133,062	130,702	532,578	-9.1	5.4	3.4	5.3	1.1
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
<b>JAPAN</b>	<b>1,064</b>	<b>1,106</b>	<b>1,202</b>	<b>1,221</b>	<b>4,593</b>	<b>1,212</b>	<b>1,158</b>	<b>1,214</b>	<b>1,150</b>	<b>4,734</b>	<b>-12.2</b>	<b>-4.5</b>	<b>-1.0</b>	<b>6.2</b>	<b>-3.0</b>
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	546	552	552	2,162	558	521	535	527	2,141	-8.2	4.8	3.2	4.7	1.0
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 April 24, 2025, subject to change.

## Group vs. True Independent; Leisure vs. Business

JAPAN MMA (by Air)	2019	2020	2021	2022	2023	2024RP	YTD May 2025P	YTD May 2024RP	% Change
Group vs True Independent (Net)									
Group Tour	246,490	NA	204	12,941	73,690	99,269	32,559	30,534	6.6%
True Independent (Net)	594,917	NA	18,155	143,576	339,436	391,676	137,443	147,852	-7.0%
Leisure vs Business									
Pleasure (Net)	1,360,644	247,980	13,254	158,823	505,037	607,054	232,568	239,052	-2.7%
MCI (Net)	85,595	18,464	563	8,542	41,150	53,562	16,277	14,250	14.2%
Convention/Conf.	12,527	3,983	135	2,214	4,790	4,781	2,348	1,359	72.8%
Corp. Meetings	4,068	951	368	981	1,911	1,400	547	428	27.9%
Incentive	70,254	13,922	75	5,712	34,969	47,560	13,650	12,491	9.3%

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.

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 May 2025P	YTD May 2024RP	% Change
First Time Visitors (%)	31.7	NA	14.2	21.4	26.0	27.8	28.6	27.7	0.9
Repeat Visitors (%)	68.3	NA	85.8	78.6	74.0	72.2	71.4	72.3	-0.9

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 May 2025P	YTD May 2024RP	% Change
State tax revenue generated (\$ Millions) <sup>2/</sup>	262.43	NA	7.60	41.69	107.91	124.45	44.98	46.29	-2.8%

<sup>2/</sup>State government tax revenue generated (direct, indirect, and induced).

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