JAPAN Market Update

Eric Takahata

Managing Director
Hawai'i Tourism Japan

2026 Spring Tourism Update

HAWAI'I TOURISM AUTHORITY

MARKET ANALYSIS

JAPAN MARKET VISITOR STATISTICS (YOY % CHANGE)

	2025 YTD	2024 YTD	Recovery % vs 2024
Total Spending ($Million)	$1,081.2	$1,050.6	102.9%
Per Person Per Day ($)	$244.40	$239.60	102.0%
Visitor Arrivals	731,922	708,234	103.3%
Visitor Days	4,424,565	4,385,692	100.9%
Length of Stay	6.05	6.19	97.7%

Source: https://www.hawaiitourismauthority.org/

ECONOMY & TRAVEL

Japan GDP growth modest (0.7%~1.1% in 2026); weak yen hampers overseas travel ($1=¥142–¥165 in 2026)
*$1 = ¥110 pre-COVID
***30% increase for travel to Hawaiʻi**

Outbound travel at 73% of 2019; growth concentrated in Asia and short haul destinations with double digit YoY increases

Growing negative sentiment toward U.S. linked to deportations and geopolitical / economic uncertainties (tariffs, etc.)

Japan completely lifted all COVID-19 travel restriction on April 29, 2023

COMPETITIVE LANDSCAPE

Competition

- **Faster air capacity recovery**
- **Higher investment in Japan Market**

Short-haul destinations: Korea, Taiwan, Hong Kong capitalize on price and convenience

Mid-haul destinations: Australia, Singapore, Thailand targeting mindful travelers

Hawaiʻi must differentiate with authenticity, cultural depth and premium experiences (Branding)

Hawai‘i’s Destination Positioning in Japan

Top desired destinations

1. Hawai‘i
2. South Korea
3. Taiwan
4. Thailand
5. US mainland
6. France
7. Italy
8. Australia
9. Vietnam
10. Singapore

Top searched destinations

1. Seoul
2. Taipei
3. Honolulu
4. Bangkok
5. Paris
6. Los Angeles
7. Singapore
8. London
9. Hong Kong
10. Bali

Top booked destinations

1. Seoul
2. Bangkok
3. Taipei
4. Paris
5. Singapore
6. London
7. Honolulu
8. Los Angeles
9. Ho Chi Minh City
10. Manila

Source: Expedia Japan

PACKAGE COST COMPARISON

Apr 2026

[As of January 21]

Night	Hawai‘i	Guam	Australia	Seoul	Taiwan	Bangkok	Paris	London	Los Angeles	Singapore
4NT	¥438,250	¥310,550	¥205,900	¥159,050	¥166,300	¥247,430	¥551,600	¥529,400	¥412,400	¥334,800
3NT	¥328,650	¥302,900	¥186,900	¥145,300	¥113,200	¥234,800	N/A	¥466,300	¥379,550	¥294,300

May 2026

Night	Hawai‘i	Guam	Australia	Seoul	Taiwan	Bangkok	Paris	London	Los Angeles	Singapore
4NT	¥455,800	¥347,500	¥255,800	¥167,550	¥188,300	¥222,300	¥579,000	¥564,800	¥418,450	¥281,000
3NT	¥412,400	¥345,400	¥211,800	¥149,500	¥158,950	¥209,800	N/A	¥420,300	¥394,200	¥224,800

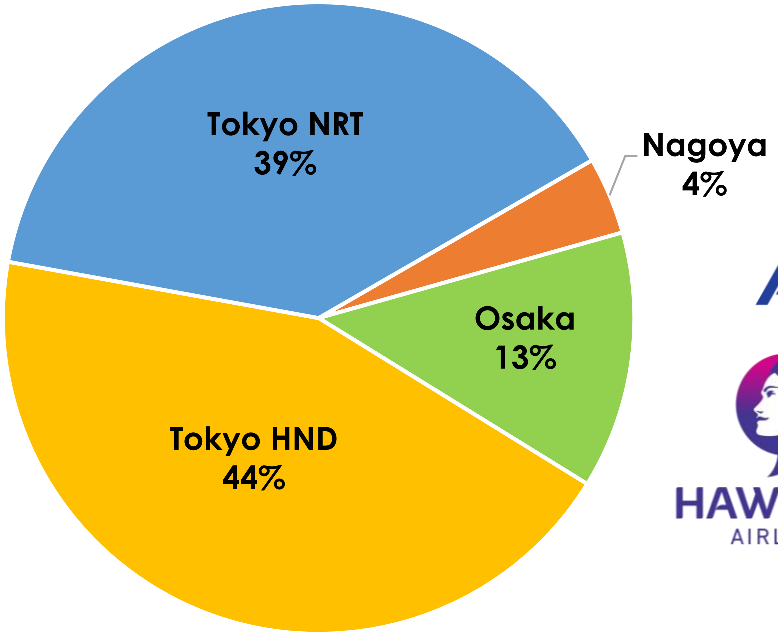




AIR SEAT SYNOPSIS

Top 5 % Share by Area (2025)

Kanto/Narita/Haneda
Kinki/Kansai
Chubu/Nagoya
Kyushu/Fukuoka
Tohoku



	Flights			Seats		
	2026	2025	% of 2025	2026	2025	% of 2025
March	358	369	97.0%	105,283	104,074	101.2%
April	360	393	91.6%	105,148	110,945	94.8%
May	363	382	95.0%	103,037	107,701	95.7%
Total	1,081	1,144	94.5%	313,468	322,720	97.1%

Source: HTA Infrastructure Research Scheduled Air Seats and Flights March-May 2026-2025-2019

AFFLUENT MARKET & SENIORS MARKET

Japan is a super-aged society, with approximately **one in three people aged 65 or older**—nearly double the proportion of seniors compared to the United States.

Estimated total savings of seniors aged 65 and over: **675 trillion yen ($4.5 trillion USD)**

The average per household amounts to **¥25.04 million (approximately $166,933 USD)**.
The assets to be inherited are estimated at **¥40 trillion (approximately $266.7 billion USD)** annually, and this amount is expected to **increase steadily as society enters a super-aging era**.

	Japan	United States
Proportion of people aged 65 and over	**30.1%**	**16.8%**
Ratio	Japan is about **1.8 times** that of the US	
Median age	49.8 years old	38.5 years old

	Japan	United States
Cash and deposits	**51.6%**	13.5%
Stocks and investment trusts	17.4%	**50.4%**
Insurance, pensions, and fixed guarantees	28.5%	25.3%
Others (such as bonds)	2.5%	10.8%

Source: TBWA Hakuhodo

TARGET AUDIENCE

GEOGRAPHIC TARGETS

Primary (Regions with direct flights)

- Kanto (Tokyo, Kanagawa, Saitama, Chiba, Ibaraki, Tochigi, Gunma)
- Kansai (Osaka, Kyoto, Hyogo, Nara, Shiga, Wakayama, Mie)
- Nagoya

Secondary (Well connected to direct-flight airports)

- Kyushu (Fukuoka)
- Chugoku (Hiroshima)
- Shikoku
- Tohoku
- Hokkaido (Sapporo)

Sister-Cities

- Hokkaido
- Okinawa
- Fukuoka
- Hiroshima
- Yamaguchi
- Ehime

TARGET PROFILES – TRAVEL READY AUDIENCE

Active Seniors (60s–70s):
Prosperous, time-rich, multi-gen family travelers

New Wealth Class (40s–60s):
Entrepreneurs, investors, lifestyle hobbyists

Power Couples (30s–50s):
Dual-income professionals, wellness-focused

Affluent Z (20s–30s):
SNS-natives, high discretionary spend

NICHE AUDIENCES – TRAVEL READY AUDIENCE

Hawai'i Repeaters:
72% repeat rate; many view Hawai'i as a "second home"

Hula Market:
1.5–2M enthusiasts, cultural ambassadors

Special Interest Groups
Pickleball, other niche activities

STRATEGIES & TACTICS

SHORT-TERM BOOKING ACCELERATION

Partnerships & campaigns

Expand co-op and launch high-impact ads to boost Hawai‘i’s appeal

Targeted marketing

Focus on affluent segments, digital CTAs, hula, educational tourism

Training

Strengthen and align education with campaign goals (branding)

LONG-TERM GROWTH

Brand management

Protect Hawaiʻi's brand strength amid resource constraints and global challenges (economy, geopolitical, U.S. sentiment)

Market growth

Promote neighbor islands; attract younger travelers and first-time visitors

MICE & partnerships

Collaborate with Meet Hawaiʻi; co-create with local partners. Importance to fill 2-year hiatus of convention center with smaller Japanese groups

Content & media

Build sustainable owned media; deliver consistent, high-value content

2026 MAJOR PROGRAMS

RECOVERY CO-OP

Collaborate with OTA by creating special landing page, placing advertisements, and increase PR and Media Engagement

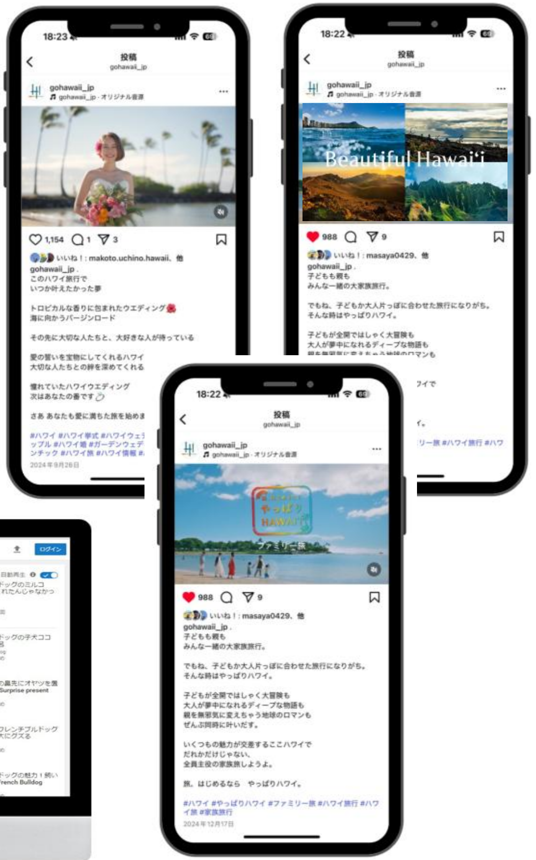
Begin in Q2

ADVERTISING

OOH

PRINT

YouTube



Facebook
Instagram

Web Banner

Yappari Hawai'i, Beautiful Hawai'i, Golf, Romance promotional materials were placed in various outlets

Q1 results: 41,448,114 Impressions

YAPPARI HAWAI‘I WELCOME CAMPAIGN (Ends 3/31)

16 Hotel & Attraction Partners

Up to Q1 results:

- 25,742 clicks to participating partners’ page
- 343 bookings (169 room nights for hotels and 639 pax for activity)
- Q1 advertisement results: 36,161,967 impressions


ACTIVE SENIOR CAMPAIGN
Because I’m old.


Time to enjoy because I’m old.
Age is just a number! I put myself first and enjoy doing what I love.
We propose a new kind of Hawai‘i trip for seniors who feel the same.

ACTIVE SENIOR CAMPAIGN

Promotional video filming completed in March
Development of creatives in March and April
Press conference in April
OOH campaign
Targeted media collaboration

Develpment of senior-exclusive tours & packages with local travel partners

Communication with industry partners for value-ad programs

BEAUTIFUL HAWAIʻI ~ NEIGHBOR ISLAND PROMOTION

Digital contents

5 main promotional video
100 short promotional videos

From Island

YouTube Shorts
TikTok

Hawaiʻi Island and Maui
Product Development

Media Exposure

DIGITAL MARKETING

allhawaii
ハワイ州観光局公式日本語サイト

YouTube

Facebook

X

Instagram

LINE

YouTube

TikTok

Strengthen owned media contents and diffuse information via SNS platforms
Facebook/Instagram/X: 10,865,833 impressions
YouTube/TikTok: 1,178,757 views

JAPAN SUMMIT 4/17

LOCATION: LIMELIGHT HAWAIʻI & HAWAIʻI CONVENTION CENTER

B2B event for planners and wholesalers; focus on product development and outbound recovery

INDUSTRY EDUCATION








Maintain strong, positive relationships with key industry partners while reinforcing Hawai'i awareness

Q1 results

7 Seminars/Webinars (Travel trade, media, Aloha Program members): 938 attendees

OVB joint Honolulu agent FAM: 10 participants from major wholesalers and OTA

IMPORTANCE OF JAPAN MARKET

- Represents approximately 44% of all international arrivals to Hawai‘i, with continued growth in market share
- One of the most mature and well-developed markets after the U.S., with strong infrastructure and long-standing travel demand
- Holds a top-tier position among overseas destinations for Japanese travelers, with strong industry-wide focus and support
- Backed by a deep historical relationship between Japan and Hawai‘i, extending beyond tourism to include:
  - Business and investment ties
  - Sister city relationships with 36 municipalities
- Japan remains a strategically critical market for Hawai‘i across multiple sectors, including tourism, investment, real estate, and infrastructure


MAHALO
HAWAI'I TOURISM
JAPAN