



Japan Fact Sheet

Japan Overview

Hawai'i Tourism Japan (HTJ) continues to focus on accelerating bookings to the Hawaiian Islands through strategic actions including expanded co-op initiatives and targeted campaigns. HTJ's core strategies include a mix of consumer education, travel trade, public relations, and social media. Key initiatives include the ongoing co-op program featuring the "Yappari Hawai'i" ("It's Gotta Be Hawai'i") campaign, partnerships with airlines and online travel agencies, and targeted promotions such as the "Hawai'i from Age 65" campaign, which inspires affluent senior travelers to choose Hawai'i.

Year-to-Date June 2026 Quick Facts^{1/}

Visitor Expenditures: \$495.2 million
Primary Purpose of Stay: Pleasure (305,583) vs. MCI (17,227)
Average Length of Stay: 5.90 days
First Time Visitors: 30.0%
Repeat Visitors: 70.0%

JAPAN MMA (by Air)	2020	2021	2022	2023	2024	2025P	2026 Annual Forecast*	YTD June 2026P	YTD June 2025P	% Change
Visitor Expenditures (\$ Millions)	NA	65.1	359.4	930.3	1,050.6	1,081.2	1,107.1	495.2	470.4	5.3%
Visitor Days	1,719,843	294,720	1,526,608	3,864,472	4,385,692	4,424,565	4,484,499	2,002,961	1,912,197	4.7%
Arrivals	289,137	18,936	192,562	589,172	708,233	731,922	750,077	339,588	319,474	6.3%
Average Daily Census	4,699	807	4,182	10,588	11,983	12,122	12,286	11,066	10,565	4.7%
Per Person Per Day Spending (\$)	NA	220.9	235.4	240.7	239.6	244.4	246.9	247.2	246.0	0.5%
Per Person Per Trip Spending (\$)	NA	3,438.8	1,866.4	1,578.9	1,483.5	1,477.2	1,476.0	1,458.2	1,472.5	-1.0%
Length of Stay (days)	5.95	15.56	7.93	6.56	6.19	6.05	5.98	5.90	5.99	-1.5%

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) 2026 annual forecast (Quarter 2, 2026).

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^{1/} 2026P and 2025P visitor data are preliminary.

2020 – 2024 visitor data are the final numbers and reflect updated airfare statistics from DIIO Mi Airline database, APIS I-94 data from the National Travel and Tourism Office, and final passenger counts from Airline Traffic Summary reports.

Market Summary

- In the first half of 2026, there were 339,588 visitors from Japan compared to 319,474 visitors (+6.3%) in the first half of 2025.
- In the first half of 2026, Japanese visitors spent \$495.2 million and the average daily spending was \$247 per person. In the first half of 2025, Japanese visitors recorded \$470.4 million in total spending and the average daily visitor spending was \$246 per person.
- There were 2,118 scheduled flights with 612,837 seats from Japan in the first half of 2026. There were fewer flights (2,169, -2.4%) and seats (615,172 seats, -0.4%) compared to the first half of 2025.
- In 2025, there were 731,922 visitors from Japan compared to 708,233 visitors (+3.3%) in 2024. Visitors from Japan spent \$1.08 billion in 2025 compared to \$1.05 billion (+2.9%) in 2024. Daily visitor spending in 2025 (\$244 per person) increased from 2024 (\$240 per person, +2.0%).
- There were 4,549 scheduled flights with 1,303,505 seats from Japan in calendar year 2025. Air capacity decreased compared to 2024 (4,734 flights, -3.9% with 1,384,265 seats, -5.8%).
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Market Conditions (Updated Quarterly)

- According to Government of Japan, the Japan Consumer Price Index (CPI) increased 1.6 percent in May 2026, up from a 2.8 percent gain in April 2026.
- Unemployment rate in April 2026 was 2.5 percent.
- The USD/JPY exchange rate as of May 2026 is 158.2.
- Japan Airlines and All Nippon Airways said on June 12, 2026, that fuel surcharges on fares for flights from Japan to North America and Europe would rise to a record 65,000 yen for tickets issued in July and August 2026 (Source: Nation Thailand).
- According to the Japan National Tourism Organization (JNTO), Japanese outbound travelers totaled 1.127 million in May 2026, up 4.7 percent from 2025, marking three consecutive months of year-over-year growth since March.
- The Japan Association of Travel Agents (JATA) is expanding its “More! Go Overseas” campaign in conjunction with reduced passport application fees effective July 1. With Japan's passport ownership rate at 18.4 percent, the public-private initiative aims to stimulate outbound travel and ultimately reach 20 million Japanese overseas travelers by 2030.
- Data from multiple travel industry sources shows that Japanese outbound travel for summer 2026 (July-September, including the Obon holidays in mid-August) remains steady despite a weaker yen and higher costs. JTB ranked Hawai'i as the most popular overseas destination for the second year in a row for independent travelers.
- Japanese travelers continue to prioritize experiences despite higher costs. VELTRA reported that average spending on local tours for summer 2026 increased to approximately ¥27,000 per customer, or 146% of the prior-year level, with travelers prioritizing activities and dining while reducing spending elsewhere.
- ANA and JAL increased international fuel surcharges for tickets issued July 1 through August 31, bringing the one-way surcharge for Hawai'i routes to ¥40,400.

- ZIPAIR announced on June 11 that it will add extra flights on 4 routes from Narita during the summer holiday period, including daily Honolulu service from August 19-26 and additional flights on select days. ZIPAIR does not impose a fuel surcharge.

Distribution by Island

JAPAN MMA (by Air)	2020	2021	2022	2023	2024	2025P	YTD June 2026P	YTD June 2025P	% Change
O'ahu	269,402	18,001	186,609	573,719	693,066	715,104	331,729	311,802	6.4%
Maui County	8,265	775	5,710	11,927	14,070	14,956	N/A	6,943	N/A
Maui	7,929	766	5,408	11,383	13,421	14,480	6,076	6,746	-9.9%
Moloka'i	416	16	179	587	669	456	N/A	194	N/A
Lāna'i	128	19	301	489	388	441	N/A	253	N/A
Kaua'i	3,622	361	2,958	5,885	6,960	7,064	2,848	3,319	-14.2%
Island of Hawai'i	35,453	1,000	15,510	44,758	46,368	45,954	22,100	20,334	8.7%

P=Preliminary data.

N/A= Due to limited data, Moloka'i and Lāna'i statistics are not available.

Airlift: Scheduled Seats and Flights

Scheduled Seats	Quarter 1 2026	Quarter 2 2026	Quarter 3 2026	Quarter 4 2026	Annual 2026	Quarter 1 2025	Quarter 2 2025	Quarter 3 2025	Quarter 4 2025	Annual 2025	% Change Quarter 1	% Change Quarter 2	% Change Quarter 3	% Change Quarter 4	% Change 2026 vs. 2025
JAPAN	307,620	303,065	318,063	301,696	1,230,444	301,281	321,342	346,932	333,950	1,303,505	2.1	-5.7	-8.3	-9.7	-5.6
Fukuoka	0	0	0	0	0	10,842	10,842	10,842	6,116	38,642	-100.0	-100.0	-100.0	-100.0	-100.0
Nagoya	15,296	12,667	19,120	19,598	66,681	12,189	12,428	20,315	21,988	66,920	25.5	1.9	-5.9	-10.9	-0.4
Osaka	42,706	40,555	45,413	45,891	174,565	40,316	40,833	46,369	47,564	175,082	5.9	-0.7	-2.1	-3.5	-0.3
Tokyo HND	134,650	135,858	137,632	137,667	545,807	126,908	135,888	136,490	137,460	536,746	6.1	0.0	0.8	0.2	1.7
Tokyo NRT	114,968	113,985	115,898	98,540	443,391	111,026	121,351	132,916	120,822	486,115	3.6	-6.1	-12.8	-18.4	-8.8

Scheduled Flights	Quarter 1 2026	Quarter 2 2026	Quarter 3 2026	Quarter 4 2026	Annual 2026	Quarter 1 2025	Quarter 2 2025	Quarter 3 2025	Quarter 4 2025	Annual 2025	% Change Quarter 1	% Change Quarter 2	% Change Quarter 3	% Change Quarter 4	% Change 2026 vs. 2025
JAPAN	1,051	1,059	1,111	1,063	4,284	1,064	1,131	1,204	1,150	4,549	-1.2	-6.4	-7.7	-7.6	-5.8
Fukuoka	0	0	0	0	0	39	39	39	22	139	-100.0	-100.0	-100.0	-100.0	-100.0
Nagoya	64	53	80	82	279	51	52	85	92	280	25.5	1.9	-5.9	-10.9	-0.4
Osaka	164	155	175	177	671	154	156	179	184	673	6.5	-0.6	-2.2	-3.8	-0.3
Tokyo HND	540	545	552	552	2,189	512	545	547	551	2,155	5.5	0.0	0.9	0.2	1.6
Tokyo NRT	283	306	304	252	1,145	308	339	354	301	1,302	-8.1	-9.7	-14.1	-16.3	-12.1

Source: DBEDT analysis from Diio Mi seat and flight schedules as of February 23, 2026, subject to change.

Group vs. True Independent; Leisure vs. Business

JAPAN MMA (by Air)	2020	2021	2022	2023	2024	2025P	YTD June 2026P	YTD June 2025P	% Change
Group vs True Independent (Net)									
Group Tour	NA	204	12,941	73,690	97,622	95,062	40,948	42,685	-4.1%
True Independent (Net)	NA	18,155	143,576	339,436	382,505	396,002	187,946	164,936	14.0%
Leisure vs Business									
Pleasure (Net)	247,980	13,254	158,823	505,037	609,090	633,394	305,583	280,644	8.9%
MCI (Net)	18,464	563	8,542	41,150	52,725	50,684	17,227	21,000	-18.0%
Convention/Conf.	3,983	135	2,214	4,790	4,627	8,586	2,404	2,696	-10.8%
Corp. Meetings	951	368	981	1,911	1,392	1,228	832	580	43.5%
Incentive	13,922	75	5,712	34,969	46,885	41,336	14,263	17,999	-20.8%

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.

First Timers vs. Repeat Visitors

JAPAN MMA (by Air)	2020	2021	2022	2023	2024	2025P	YTD June 2026P	YTD June 2025P	% Change
First Time Visitors (%)	NA	14.2	21.4	26.0	27.5	29.0	30.0	29.4	0.6
Repeat Visitors (%)	NA	85.8	78.6	74.0	72.5	71.0	70.0	70.6	-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.

Tax Revenue

JAPAN MMA (by Air)	2020	2021	2022	2023	2024	2025P	YTD June 2026P	YTD June 2025P	% Change
State tax revenue generated (\$ Millions)	NA	7.60	41.69	107.91	146.94	151.21	69.26	65.79	5.3%

³State government tax revenue generated (direct, indirect, and induced) for 2024, 2025P; year-to-date 2025P and year-to-date 2026P were calculated using the new Hawai'i Tourism Input-Output model (October 2025) and are not directly comparable to previous years' calculations.