



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 "Active Senior" campaign, which aims to inspire affluent senior travelers to choose Hawai'i.

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

Visitor Expenditures: \$157.2 million
 Primary Purpose of Stay: Pleasure (99,545) vs. MCI (4,738)
 Average Length of Stay: 5.84 days
 First Time Visitors: 29.4%
 Repeat Visitors: 70.6%

JAPAN MMA (by Air)	2020	2021	2022	2023	2024	2025P	2026 Annual Forecast*	YTD Feb. 2026P 2/	YTD Feb. 2025P	% Change
Visitor Expenditures (\$ Millions)	NA	65.1	359.4	930.3	1,050.6	1,081.2	1,128.3	157.2	151.4	3.8%
Visitor Days	1,719,843	294,720	1,526,608	3,864,472	4,385,692	4,424,565	4,525,465	636,716	615,368	3.5%
Arrivals	289,137	18,936	192,562	589,172	708,233	731,922	750,914	109,109	102,328	6.6%
Average Daily Census	4,699	807	4,182	10,588	11,983	12,122	12,399	10,792	10,430	3.5%
Per Person Per Day Spending (\$)	NA	220.9	235.4	240.7	239.6	244.4	249.3	246.8	246.0	0.4%
Per Person Per Trip Spending (\$)	NA	3,438.8	1,866.4	1,578.9	1,483.5	1,477.2	1,502.6	1,440.3	1,479.1	-2.6%
Length of Stay (days)	5.95	15.56	7.93	6.56	6.19	6.05	6.03	5.84	6.01	-3.0%

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 1, 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.

^{2/} Due to limited data, Moloka'i and Lāna'i visitor statistics were not reported for February 2026. Total arrivals statewide, arrivals to O'ahu, Maui, Kaua'i and Hawai'i Island and arrivals by visitor markets were not affected. Year-to-Date 2026 Visitor spending, visitor days, length of stay and average daily census data did not include those who visited Moloka'i and Lāna'i.

Market Summary

- In the first two months of 2026, there were 109,109 visitors from Japan compared to 102,328 visitors (+6.6%) in the first two months of 2025.
- In the first two months of 2026, Japanese visitors spent \$157.2 million and the average daily spending was \$247 per person. In the first two months of 2025, Japanese visitors on all Hawaiian Islands recorded \$151.4 million in total spending and the average daily visitor spending was \$246 per person.
- There were 694 scheduled flights with 202,688 seats from Japan in the first two months of 2026. Air capacity increased compared to the first two months of 2025 (691 flights, +0.4% with 195,127 seats, +3.9%).
- 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%).

Market Conditions (Updated Quarterly)

- On January 19, 2026, Prime Minister Sanae Takaichi announced the dissolution of the House of Representatives and a general election. The market reacted with yen depreciation and rising stock prices, pushing USD/JPY past 159 and near 160. Following rapid depreciation, Japanese and U.S. authorities conducted rate checks on January 23, 2026, after which the yen strengthened to the 152 level.
- According to the Japan National Tourism Organization (JNTO), Japanese outbound travelers totaled 14.73 million in 2025, up 1.73 million (+13.3%) from 2024.
- 2026 is a favorable year for travel, with four potential extended holiday periods of 8–9+ days (Golden Week, Obon, Silver Week, and year-end/New Year) when paid leave is used, and no public holidays falling on Saturdays.
- There is growing interest in “skip-gen travel” (grandparents traveling with grandchildren without parents), with 37 percent of Japanese travelers having participated or planning to do so. Key motivations include shared new experiences and cultural exploration (cited by ~50%), strengthening family bonds (37%), and accommodating busy parents (26%). Nearly half (48%) prioritize family or connecting rooms, and 26 percent of families take multi-generational trips at least annually.
- Major travel companies ran international travel New Year sales in January 2026. HIS's "New Year Dream Fair 2026" had Hawai'i 5-day packages starting at 89,800 yen. JTB's "Fuku-Haru 2026" offered special discount plans for popular destinations like Asia and Hawai'i, with coupons up to 12,000 yen off. JAL gave discounts up to 50,000 yen per person on Hawai'i packages, with Narita-Honolulu 2-night/4-day trips starting at 88,800 yen. Rakuten Travel had up to 50,000 yen off international tours, and NEWT featured Hawai'i tours from 98,800 yen. Using Japan's "Hatsuuri" (New Year sale) tradition, travel companies offered discounted prices and special deals to get bookings for both near-term and future travel.

- ANA and JAL also held New Year airfare sales, with round-trip economy fares starting from about ¥87,000 for travel through September 2026, targeting early demand.
- Delta Air Lines announced an increase in the fuel surcharge for tickets issued in February 2026. One-way to HNL increased from ¥16,000 to ¥24,000.

Distribution by Island

JAPAN MMA (by Air)	2020	2021	2022	2023	2024	2025P	YTD Feb. 2026P 2/	YTD Feb. 2025P	% Change
O'ahu	269,402	18,001	186,609	573,719	693,066	715,104	107,003	99,919	7.1%
Maui County	8,265	775	5,710	11,927	14,070	14,956	1,833	2,328	-21.3%
Maui	7,929	766	5,408	11,383	13,421	14,480	1,833	2,280	-19.6%
Moloka'i	416	16	179	587	669	456	0	53	-100.0%
Lāna'i	128	19	301	489	388	441	0	88	-100.0%
Kaua'i	3,622	361	2,958	5,885	6,960	7,064	925	948	-2.5%
Island of Hawai'i	35,453	1,000	15,510	44,758	46,368	45,954	5,987	5,657	5.8%

P=Preliminary data.

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 Feb. 2026P	YTD Feb. 2025P	% Change
Group vs True Independent (Net)									
Group Tour	NA	204	12,941	73,690	97,622	95,062	12,527	11,304	10.8%
True Independent (Net)	NA	18,155	143,576	339,436	382,505	396,002	56,252	53,199	5.7%
Leisure vs Business									
Pleasure (Net)	247,980	13,254	158,823	505,037	609,090	633,394	99,545	91,222	9.1%
MCI (Net)	18,464	563	8,542	41,150	52,725	50,684	4,738	5,596	-15.3%
Convention/Conf.	3,983	135	2,214	4,790	4,627	8,586	614	822	-25.3%
Corp. Meetings	951	368	981	1,911	1,392	1,228	120	221	-46.0%
Incentive	13,922	75	5,712	34,969	46,885	41,336	4,033	4,639	-13.1%

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.

P=Preliminary data.

First Timers vs. Repeat Visitors

JAPAN MMA (by Air)	2020	2021	2022	2023	2024	2025P	YTD Feb. 2026P	YTD Feb. 2025P	% Change
First Time Visitors (%)	NA	14.2	21.4	26.0	27.5	29.0	29.4	28.8	0.7
Repeat Visitors (%)	NA	85.8	78.6	74.0	72.5	71.0	70.6	71.2	-0.7

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 Feb. 2026P 3/	YTD Feb. 2025P	% Change
State tax revenue generated (\$ Millions)	NA	7.60	41.69	107.91	146.94	151.21	21.98	21.17	3.8%

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.