

A couple is seen from behind, paddling a yellow and white kayak on a calm, turquoise lake. They are both wearing orange life jackets. The background features dramatic limestone karsts under a blue sky with scattered white clouds. The water reflects the surrounding landscape.

# 2025 Summer Travel Trends Report

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VELTRA

# Trends for Summer 2025: Insights from VELTRA Booking Data

According to statistics from the JNTO, the number of Japanese outbound travelers from January to March 2025 has recovered to about 70% of 2019 levels. This suggests that rising travel costs and other external factors are significantly impacting Japanese outbound travel trends.

Amidst this, the number of bookings for local experience activities handled by VELTRA has steadily increased by +16.2% compared to the same period last year, indicating that local experiences remain a crucial element of outbound travel.

This report, based on booking status as of May 2025, examines the booking trends for popular destinations and local activities for Japanese travelers during the peak travel season of June to August 2025.

Survey Date: May 20, 2025

Target: Tours & activities booked through VELTRA for participation between June 1 and August 31, 2025.



# 2025 Summer Booking Trends

## Executive Summary

### 1. Exchange Rate Impact on Popular Destinations

In the ranking of destinations for Summer 2025, Oahu, Hawaii, maintains its top position. However, there's a notable increase in popularity for Europe (especially Paris) and North America (Los Angeles, Las Vegas). Some major Asian cities have fallen out of the top 10, indicating relative shifts in rankings. This trend is likely influenced by the strengthening yen, making travel to the US more affordable, and a growing desire to visit aspirational cities. Conversely, the weakening yen against some Asian currencies may have diminished the perception of value for destinations like South Korea and Thailand.

### 2. Popularity of Classic and Convenient Activities

Traditional resort experiences like Hawaiian sunset cruises and marine activities remain popular. In Asia, historical and cultural experiences such as Ayutthaya ruins and DMZ tours rank high. In Europe and the US, grand natural experiences like the Grand Canyon and world heritage/scenic tours such as Mont Saint-Michel are favored. In the Middle East and Africa, unique cultural experiences like desert safaris are popular. A common trend across all regions is the desire for convenient and efficient transportation.

### 3. Continued Increase in Customer Spending

The average customer spending on local experience activities continues to rise, with an overall increase of +43% compared to the previous year. This is primarily attributed to the combined effects of exchange rate fluctuations and higher local prices. Notably, Asia saw a significant increase of +34% in spending, suggesting that its perceived affordability compared to other regions is diminishing. In contrast, the increase in spending for Hawaii was relatively modest at +4%.

### 4. Preference for Safety, Ease, and Private Experiences

The proportion of "sightseeing tour" bookings increased by approximately 4%, and "airport transfer" also saw a 1.5% rise. This indicates a growing preference among travelers for convenience, smooth transportation, and a sense of security when traveling abroad. Furthermore, there's a heightened interest in securing "tickets" in advance as a solid travel plan and in "private tours" for a more personalized experience.

## Trends in Travel Destinations for 2025

DESTINATION		2024 RANK	
1 <sup>st</sup>	Hawaii (Oahu)	1 <sup>st</sup>	(—)
2 <sup>nd</sup>	Paris, France	6 <sup>th</sup>	(↑)
3 <sup>rd</sup>	Cairns, Australia	5 <sup>th</sup>	(↑)
4 <sup>th</sup>	Seoul, South Korea	3 <sup>rd</sup>	(↓)
5 <sup>th</sup>	Guam	4 <sup>th</sup>	(↓)
6 <sup>th</sup>	Los Angeles, USA	22 <sup>nd</sup>	(↑)
7 <sup>th</sup>	London, UK	8 <sup>th</sup>	(↑)
8 <sup>th</sup>	Bangkok, Thailand	2 <sup>nd</sup>	(↓)
9 <sup>th</sup>	Barcelona, Spain	9 <sup>th</sup>	(—)
10 <sup>th</sup>	Las Vegas, USA	21 <sup>st</sup>	(↑)

### Exchange rate boosts US/Europe travel; Asia's appeal softens

In 2025, Hawaii (Oahu) remains an unshakeable favorite, alongside consistently popular destinations like Cairns, Seoul, and Guam, which are relatively easy to travel to from Japan. Los Angeles and Las Vegas are particularly noteworthy. The appreciation of the yen against the dollar in the past year may have lowered the barrier to travel to the US.

Furthermore, the yen's appreciation against the euro and the Olympics held last year have further boosted Paris's popularity.

Conversely, destinations like South Korea and Thailand in Asia might have become less appealing due to the exchange rate making them less affordable.

Overall, changes in rankings are observed due to exchange rate fluctuations and a growing desire among travelers to visit the “dream destinations”.

# 2025 Tours & Activities Bookings by Region

In Hawaii, Asian countries, and Oceania, which are easily accessible from Japan, classic activities like sunset cruises in Hawaii and World Heritage tours in Asia and Oceania continue to be highly popular. The overall increase in categories like airport transfers and tours in Guam (as seen on page 8 of the report) indicates a trend towards prioritizing ease, smoothness, efficiency, and convenience in travel arrangements and transportation.

Furthermore, there's a broadening range of experiences sought by travelers, including tours that delve deeply into history and culture (Asia), active experiences in nature (Hawaii), and eco-tours combining nature conservation and adventure (Oceania).

Hawaii			Asia			Oceania & Pacific		
1	Sunset Dinner Cruise: Star of Honolulu	Honolulu Hawaii	1	Ayutthaya Ruins + Floating Market + Elephant Riding	Bangkok, Thailand	1	Kuranda (Railway & Skyrail)	Cairns, Australia
2	Hawaii Parasailing	Honolulu Hawaii	2	Tour DMZ Tour	Seoul, South Korea	2	Guam International Airport Transfer	Guam
3	Kualoa Ranch: ATV Experience	Honolulu Hawaii	3	Ha Long Bay Day Cruise	Hanoi Vietnam	3	Green Island Cruise Eco-Adventure	Cairns, Australia

# 2025 Tours & Activities Bookings by Region

In Europe, America, the Middle East, and Africa, day trips and multi-day passes that efficiently cover World Heritage sites and major attractions are popular. Activities that maximize the unique appeal of each region are also highly sought after: history and scenery in Europe, grand nature and urban entertainment in America, and exotic experiences and ancient civilizations in the Middle East and Africa.

For tours involving travel, services that reduce overall travel stress, such as buses with restrooms, airport transfers, and stadium transfers, are in demand. Beyond standard sightseeing, activities catering to diverse traveler needs, such as sports spectating, specific historical and cultural experiences, and private chartered tours, are gaining popularity.

## Europe

1	Mont Saint-Michel Day Tour with Restroom-equipped Bus	Paris France
2	Norway in a Nutshell Pass	Norway
3	Mont Saint-Michel Day Tour & Honfleur Port Town Visit	Paris France

## America

1	Grand Canyon National Park & Antelope Day Tour	Las Vegas
2	Stadium ⇔ Los Angeles Area Hotels Round-trip Transfer Service	Los Angeles
3	Los Angeles Sightseeing Tour	Los Angeles

## Middle East & Africa

1	Desert Safari: Dune Drive + Arabian BBQ Dinner	Dubai UAE
2	Giza Pyramids (3 Great Pyramids) & Egyptian Museum Tour	Cairo Egypt
3	[Private] Desert Safari: Dune Drive + Arabian BBQ Dinner	Dubai UAE

## Topics - Average Price Continues to Increase

The average customer spend per booking continues to show a significant increase of +43% overall, primarily due to the combined effects of the depreciating yen and rising local prices.

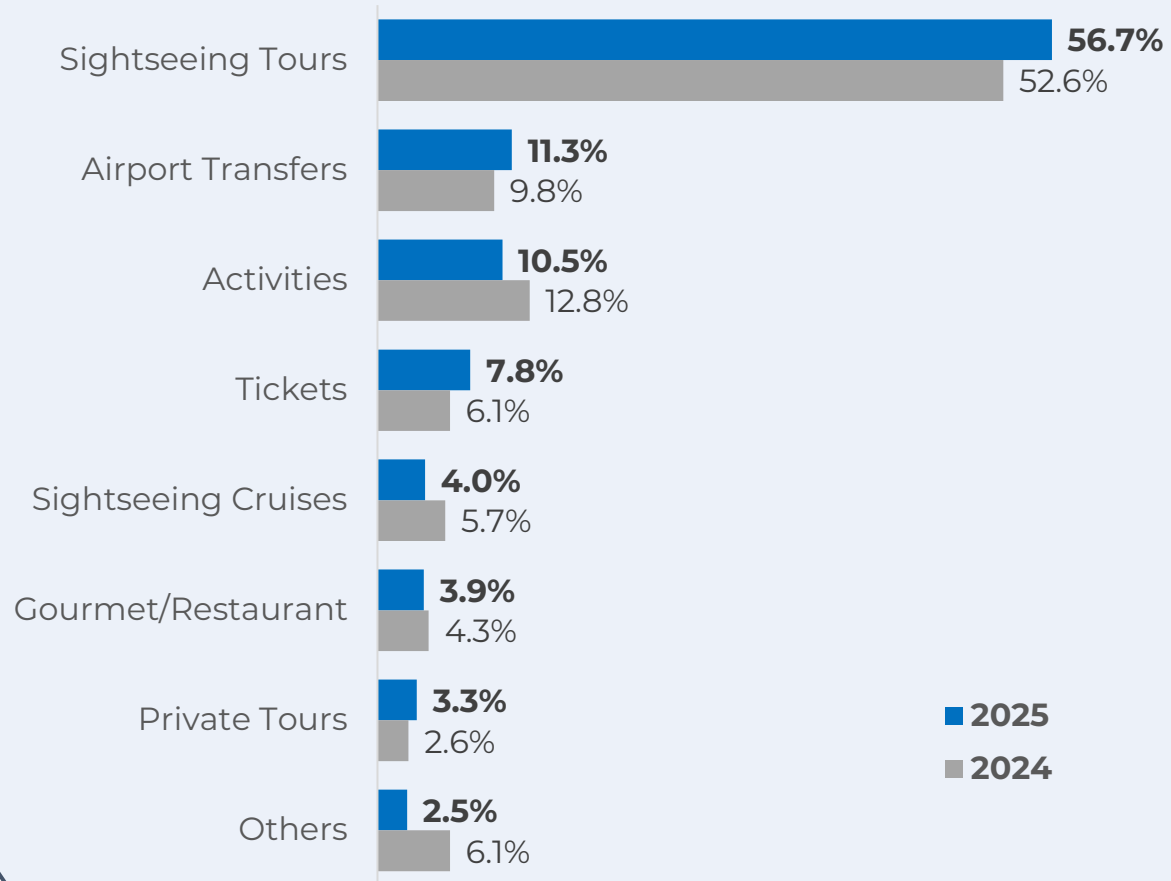
Particularly high growth rates were observed in Asia (+34%) and Europe (+29%), indicating a noticeable increase in costs even in Asia, which was previously relatively more affordable. Furthermore, North America (+27%), which already had a higher average price, saw further increases.

Conversely, the price increase in Hawaii was relatively moderate at +4%. This suggests a possible tendency to limit spending on local experiences and activities amidst rising overall travel costs, including hotels and airfare.

Change in Average Customer Price

Destination	2025	2024	Change
Asia	¥17,613	¥13,112	+34%
Hawaii	¥19,889	¥19,189	+4%
Oceania	¥21,235	¥17,704	+20%
Europe	¥31,831	¥24,766	+29%
N. America	¥62,265	¥49,020	+27%
All	¥27,609	¥19,245	+43%

### Change in Activity Type Booking Share



### Topics - Increased Demand for Safety, Ease, and Private Tours

The proportion of "sightseeing tours" increased by approximately 4%, and "airport transfers" also rose by 1.5%. This suggests a strong trend among travelers to seek more reassuring, packaged services and efficient transportation methods for outbound travel and arrangements.

On the other hand, the proportion of "activities" decreased by 2.3%, and "sightseeing cruises" by 1.7%.

Additionally, the proportion of "tickets" increased by 1.7% and "private tours" by 0.7%. This indicates a growing need for solid travel planning, such as securing major admission tickets in advance, and a heightened interest in private experiences.



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## About VELTRA

With 150 countries covered and over 20,000 tours & activities offered, VELTRA is a leader in online tours & activities services in Japan. VELTRA is dedicated to the advancement, evolution and development of a global online marketplace where people from around the world can interact, share experiences, and deepen their understanding of one another.

<https://www.veltra.com/>

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## Company Information

VELTRA Corporation (TSE: 7048)

Headquarters: 2-13-12 Nihonbashi, Chuo-ku, Tokyo, Japan

Founded: November, 1991

President, CEO: Wataru Futagi

Capital: JPY 2,078,000,000 \*as of March 2024

Business Domains: Online booking website for Tours & Activities (veltra.com, HawaiiActivities.com), Ticketing Platform (Linktivity)

For inquiries regarding this report, please contact Taka Mitamura at [pr.jp@veltra.com](mailto:pr.jp@veltra.com)