



# Japan Fact Sheet

## Japan Overview

The Hawai'i Tourism Authority selected a.link LLC for Brand Marketing and Management Services in Japan. In 2024, HTJ continues to showcase Hawai'i's unique brand story on Hawaiian culture, natural beauty, local community and businesses, and Hawai'i made products. HTJ engages target audiences with multi-channel promotions to inspire mindful travel and pivot messaging to drive bookings to Hawai'i. HTJ also leverages its extensive network to create initiatives that support regenerative tourism.

## Year-to-Date February 2024 Quick Facts<sup>1/</sup>

Visitor Expenditures: \$78.8 million  
 Primary Purpose of Stay: Pleasure (46,800) vs. MCI (3,431)  
 Average Length of Stay: 6.22 days  
 First Time Visitors: 24.2%  
 Repeat Visitors: 75.8%

JAPAN MMA (by Air)	2019	2020	2021	2022	2023P	2024 Annual Forecast*	YTD Feb. 2024P	YTD Feb. 2023P	% Change
Visitor Expenditures (\$ Millions)	2,248.3	NA	65.1	359.4	899.8	1,445.2	160.8	101.9	57.9%
Visitor Days	9,306,767	1,719,843	294,720	1,526,608	3,767,157	5,932,051	667,887	429,822	55.4%
Arrivals	1,576,205	289,137	18,936	192,562	572,979	956,782	108,627	58,955	84.3%
Average Daily Census	25,498	4,699	807	4,182	10,321	16,208	11,131	7,285	52.8%
Per Person Per Day Spending (\$)	241.6	NA	220.9	235.4	238.8	243.6	240.8	237.0	1.6%
Per Person Per Trip Spending (\$)	1,426.4	NA	3,438.8	1,866.4	1,570.4	1,510.5	1,480.6	1,727.7	-14.3%
Length of Stay (days)	5.90	5.95	15.56	7.93	6.57	6.20	6.15	7.29	-15.7%

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.

\*Dept. of Business, Economic Development & Tourism (DBEDT) 2024 annual forecast (Quarter 1, 2024).

## Contact Information

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<sup>1/</sup> 2023 and 2024 visitor data are preliminary. 2019 - 2022 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 two months of 2024, 108,627 visitors arrived from Japan and visitor spending was \$160.8 million. There were 58,955 visitors in the first two months of 2023 and visitor spending was \$101.9 million. In the first two months of pre-pandemic 2019, 241,071 visitors arrived from this market and visitor spending was \$338.9 million.
- In the first two months of 2024, 788 scheduled flights with 230,392 seats serviced Hawai'i from Japan. In the first two months of 2023, there were 521 scheduled flights with 139,953 seats. In the first two months of 2019 there were 1,328 scheduled flights with 332,260 seats.
- In 2023, there were 572,979 visitors from Japan, compared to 192,562 visitors (+197.6%) in 2022 and 1,576,205 visitors (-63.6%) in 2019.
- Visitors from Japan spent \$899.8 million in 2023, compared to \$359.4 million (+150.4%) in 2022 and \$2.25 billion (-60.0%) in 2019. Daily visitor spending in 2023 was \$239 per person, higher than 2022 (\$235 per person, +1.5%), but slightly less than 2019 (\$242 per person, -1.1%).
- In 2023, there were 3,823 scheduled flights with 1,063,623 seats from Japan. Air capacity was much greater compared to 2022 (1,928 flights, +98.3%, with 479,146 seats, +122.0%) but remained below 2019 (7,696 flights, -50.3%, with 1,999,204 seats, -46.8%).

## Market Conditions

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- On February 22, 2024, the Nikkei stock average hit a new record high in the Tokyo stock market for the first time in about 34 years, surpassing the previous record high set in 1989. This is a historic milestone for the Japanese economy, which has been suffering from the economic crisis and stagnation that followed the collapse of the "Lost 30 Years" of the bubble economy. After an extended period of stagnation, inflation has continued to rise, and wage hikes are expanding, especially among large companies. Expectations are rising for a "complete break from deflation", a positive economic cycle in which prices and wages rise in tandem.
- According to the Japan National Tourism Organization (JNTO), 836,600 Japanese departed Japan in January 2024, which was 57 percent higher than in 2019, and 89.3 percent higher than in 2023.
- According to Aviation Data OAG, international flights departed from Japan's six major airports (Narita, Kansai, Haneda, Fukuoka, Nagoya, and Sapporo) in January 2024 increased to 19,349 flights, 91 percent over 2019.
- According to the Ministry of Foreign Affairs, the number of passports issued in 2023 increased 158.3 percent from 2022. Although the number decreased by 22.3 percent compared to 2019, the analysis indicated that the reason for the significant increase was the convergence of the COVID-19.
- The travel magazine TABIZINE conducted a survey asking, "Which overseas travel destinations would you like to visit in 2024?" The most popular destination was Hawai'i (44.3% of the respondents), followed by South Korea (35.7%), and Taiwan (35.5%). Countries and regions relatively close to Japan or warmer in the south Asia tends to be popular.

- The load factors of all airlines recovered to an overall average of 72.5 percent in February 2024, compared to 63 percent in overall average in January 2024, and is expected to reach the 80 percent range in March 2024.
- Japan Airlines (JAL) will operate 4 flights a week from Tokyo (NRT) to Kona from July 22 to August 20: JL770 NRT (9:00pm) – KOA (10:05am): Monday, Tuesday, Thursday, and Saturday.

## Distribution by Island

JAPAN MMA (by Air)	2019	2020	2021	2022	2023P	YTD Feb. 2024P	YTD Feb. 2023P	% Change
O'ahu	1,492,753	269,402	18,001	186,609	558,117	106,117	57,620	84.2%
Maui County	48,524	8,265	775	5,710	11,854	2,276	1,702	33.7%
Maui	46,684	7,929	766	5,408	11,244	1,993	1,607	24.0%
Moloka'i	1,941	416	16	179	580	307	85	260.0%
Lāna'i	2,300	128	19	301	547	14	48	-71.2%
Kaua'i	25,333	3,622	361	2,958	5,811	1,029	967	6.4%
Island of Hawai'i	170,686	35,453	1,000	15,510	43,141	6,804	4,181	62.8%

## 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>357,773</b>	<b>429,378</b>	<b>440,688</b>	<b>413,336</b>	<b>1,641,175</b>	<b>216,426</b>	<b>236,924</b>	<b>286,768</b>	<b>323,505</b>	<b>1,063,623</b>	<b>65.3</b>	<b>81.2</b>	<b>53.7</b>	<b>27.8</b>	<b>54.3</b>
Fukuoka	10,842	14,456	14,734	14,456	54,488	0	7,506	11,120	10,564	29,190	NA	92.6	32.5	36.8	86.7
Nagoya	12,667	21,749	21,988	21,988	78,392	4,007	3,107	7,385	10,809	25,308	216.1	600.0	197.7	103.4	209.8
Osaka	40,833	47,047	47,564	47,564	183,008	28,512	31,785	35,130	39,626	135,053	43.2	48.0	35.4	20.0	35.5
Tokyo HND	142,252	161,434	163,208	163,208	630,102	88,113	95,079	104,972	130,590	418,754	61.4	69.8	55.5	25.0	50.5
Tokyo NRT	151,179	184,692	193,194	166,120	695,185	95,794	99,447	128,161	131,916	455,318	57.8	85.7	50.7	25.9	52.7

Scheduled flights	2024					2023					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
<b>JAPAN</b>	<b>1,226</b>	<b>1,522</b>	<b>1,564</b>	<b>1,498</b>	<b>5,810</b>	<b>818</b>	<b>856</b>	<b>1,017</b>	<b>1,132</b>	<b>3,823</b>	<b>49.9</b>	<b>77.8</b>	<b>53.8</b>	<b>32.3</b>	<b>52.0</b>
Fukuoka	39	52	53	52	196	0	27	40	38	105	NA	92.6	32.5	36.8	86.7
Nagoya	53	91	92	92	328	20	13	36	47	116	165.0	600.0	155.6	95.7	182.8
Osaka	156	182	184	184	706	108	121	136	152	517	44.4	50.4	35.3	21.1	36.6
Tokyo HND	568	637	644	644	2,493	368	378	414	521	1,681	54.3	68.5	55.6	23.6	48.3
Tokyo NRT	410	560	591	526	2,087	322	317	391	374	1,404	27.3	76.7	51.2	40.6	48.6

Source: DBEDT analysis from Diio Mi flight schedules as of January 25, 2024, subject to change.

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

JAPAN MMA (by Air)	2019	2020	2021	2022	2023P	YTD Feb. 2024P	YTD Feb. 2023P	% Change
Group vs True Independent (Net)								
Group Tour	246,490	NA	204	12,941	71,583	13,234	4,137	219.9%
True Independent (Net)	594,917	NA	18,155	143,576	330,437	58,347	39,403	48.1%
Leisure vs Business								
Pleasure (Net)	1,360,644	247,980	13,254	158,823	490,202	94,416	52,171	81.0%
MCI (Net)	85,595	18,464	563	8,542	40,711	6,989	2,830	147.0%
Convention/Conf.	12,527	3,983	135	2,214	4,703	374	637	-41.3%
Corp. Meetings	4,068	951	368	981	1,909	169	187	-10.0%
Incentive	70,254	13,922	75	5,712	34,625	6,451	2,056	213.8%

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.

## First Timers vs. Repeat Visitors

JAPAN MMA (by Air)	2019	2020	2021	2022	2023P	YTD Feb. 2024P	YTD Feb. 2023P	% Change
First Time Visitors (%)	31.7	NA	14.2	21.4	26.0	27.4	21.2	6.2
Repeat Visitors (%)	68.3	NA	85.8	78.6	74.0	72.6	78.8	-6.2

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.

## Tax Revenue

JAPAN MMA (by Air)	2019	2020	2021	2022	2023P	YTD Feb. 2024P	YTD Feb. 2023P	% Change
State tax revenue generated (\$ Millions) <sup>2/</sup>	262.43	NA	7.60	41.69	104.37	18.66	11.82	57.9%

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