



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.

January 2024 Quick Facts^{1/}

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	2023 Annual Forecast*	Jan. 2024P	Jan. 2023P	% Change
Visitor Expenditures (\$ Millions)	2,248.3	NA	65.1	359.4	899.8	899.1	78.8	58.1	35.6%
Visitor Days	9,306,767	1,719,843	294,720	1,526,608	3,767,157	3,785,071	328,846	245,127	34.2%
Arrivals	1,576,205	289,137	18,936	192,562	572,979	569,361	52,911	32,305	63.8%
Average Daily Census	25,498	4,699	807	4,182	10,321	10,370	10,608	7,907	34.2%
Per Person Per Day Spending (\$)	241.6	NA	220.9	235.4	238.8	237.5	239.7	237.1	1.1%
Per Person Per Trip Spending (\$)	1,426.4	NA	3,438.8	1,866.4	1,570.4	1,579.1	1,489.7	1,799.4	-17.2%
Length of Stay (days)	5.90	5.95	15.56	7.93	6.57	6.65	6.22	7.59	-18.1%

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) 2023 annual forecast (Quarter 4, 2023).

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^{1/} 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

- There were 52,911 visitors from Japan in January 2024, which was up significantly compared to January 2023 (32,305 visitors, +63.8%), but was still much lower than pre-pandemic January 2019 (120,418 visitors, -56.1%).
- Visitors from Japan spent \$78.8 million in January 2024, compared to \$58.1 million (+35.6%) in January 2023 and \$173.4 million (-54.5%) in January 2019. Daily spending by Japanese visitors in January 2024 (\$240 per person) was more than January 2023 (\$237 per person, +1.1%) and was similar to January 2019 (\$240 per person, 0.0%).
- In January 2024, there were 413 scheduled flights with 120,574 seats from Japan. Scheduled air capacity was much greater compared to January 2023 (283 flights, +45.9% with 75,399 seats, +59.9%), but remained below January 2019 levels (696 flights, -40.7% with 174,100 seats, -30.7%).
- 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

- Japan's exports rose at the fastest pace in a year in December 2023, boosting the likelihood of the economy returning to growth in the fourth quarter of 2023. Exports rose 9.8 percent in December 2023 from the same month of the previous year, the biggest jump and a reversal from a 0.2 percent dip in the previous month, according to the Finance Ministry. Shipments to the United States grew by double-digits while shipments to China rose for the first time in 13 months.
- Japan's GDP declined an annualized 1.4 percent in November 2023 from the previous month, marking the first drop in two months, according to an estimate released by the Japan Center for Economic Research. Private consumption, which accounts for over half total GDP, grew 0.2 percent, while corporate investment eased 0.7 percent. Based on the average growth pace for October and November 2023, experts now estimates an annualized 3.1 percent expansion for the fourth quarter of 2023 from the previous three months.
- According to the Japan National Tourism Organization (JNTO), the estimated annual number of Japanese departures in 2023 was 9,624,100, approximately 3.5 times higher than 2022, resulting in a 47 percent recovery compared to 2019. Also, in the single month of December 2023, there were 947,900 people departed Japan which was down 44.6% compared to 2019, however 19.3% above compared to 2022.
- According to the JTB Research Institute's survey on smartphone use and travel consumption, personal communication has shifted to texting and chatting, with SNSs playing a more prominent role as a "method of gathering information." Popular SNSs are LINE, YouTube, and

Instagram, with Instagram and TikTok seeing a rapid increase in usage since 2019, and the age range of users expanding. On the other hand, the declining trend is marked by Facebook, which saw a significant drop in usage rates from 2019 for both men and women in most age groups.

- Delta Air Lines has lowered its fuel surcharge for tickets issued from February 1, 2024. The surcharge for one-way flights to Hawai'i will be reduced from 26,500 yen to 24,500 yen.
- ZIPAIR announced an increase of one round-trip flight per week from Narita to Honolulu in the summer schedule starting March 31, 2024. The new flights will operate from Japan on Sunday, Tuesday, and Thursday, with an additional flight on Friday, making a total of four flights per week.
- Hawaiian Airlines announced on January 27, 2024, the suspension of late-night flights on the HND-HNL service and the HND-KOA service effective April 3, 2024. The HND-HNL service will be 12 round-trips per week (maximum 2 round-trips per day), the KIX-HNL service will be 7 round-trips per week, the NRT-HNL service will be 6 round-trips per week, and the FUK-HNL service will be 3 round-trips per week.
- JAL operated a 70th anniversary charter flight on January 27, 2024, providing 244 seats on a 777-ER300 aircraft for a flight to San Francisco via Honolulu. A commemorative ceremony was also held at Washington Place on February 2, 2024.

Distribution by Island

JAPAN MMA (by Air)	2019	2020	2021	2022	2023P	Jan. 2024P	Jan. 2023P	% Change
O'ahu	1,492,753	269,402	18,001	186,609	558,117	51,619	31,703	62.8%
Maui County	48,524	8,265	775	5,710	11,854	1,467	977	50.1%
Maui	46,684	7,929	766	5,408	11,244	1,189	911	30.6%
Moloka'i	1,941	416	16	179	580	301	46	552.5%
Lāna'i	2,300	128	19	301	547	0	32	-100.0%
Kaua'i	25,333	3,622	361	2,958	5,811	540	520	3.8%
Island of Hawai'i	170,686	35,453	1,000	15,510	43,141	3,589	2,347	52.9%

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
JAPAN	357,773	429,378	440,688	413,336	1,641,175	216,426	236,924	286,768	323,505	1,063,623	65.3	81.2	53.7	27.8	54.3
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
JAPAN	1,226	1,522	1,564	1,498	5,810	818	856	1,017	1,132	3,823	49.9	77.8	53.8	32.3	52.0
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	Jan. 2024P	Jan. 2023P	% Change
Group vs True Independent (Net)								
Group Tour	246,490	NA	204	12,941	71,583	6,080	1,688	260.2%
True Independent (Net)	594,917	NA	18,155	143,576	330,437	30,848	23,656	30.4%
Leisure vs Business								
Pleasure (Net)	1,360,644	247,980	13,254	158,823	490,202	46,800	29,006	61.3%
MCI (Net)	85,595	18,464	563	8,542	40,711	3,431	1,416	142.2%
Convention/Conf.	12,527	3,983	135	2,214	4,703	285	366	-22.1%
Corp. Meetings	4,068	951	368	981	1,909	115	103	11.4%
Incentive	70,254	13,922	75	5,712	34,625	3,036	986	207.7%

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.

First Timers vs. Repeat Visitors

JAPAN MMA (by Air)	2019	2020	2021	2022	2023P	Jan. 2024P	Jan. 2023P	% Change
First Time Visitors (%)	31.7	NA	14.2	21.4	26.0	24.2	17.6	6.6
Repeat Visitors (%)	68.3	NA	85.8	78.6	74.0	75.8	82.4	-6.6

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.

Tax Revenue

JAPAN MMA (by Air)	2019	2020	2021	2022	2023P	Jan. 2024P	Jan. 2023P	% Change
State tax revenue generated (\$ Millions) ^{2/}	262.43	NA	7.60	41.69	104.37	9.14	6.74	35.6%

^{2/}State government tax revenue generated (direct, indirect, and induced).