



# 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 March 2024 Quick Facts<sup>1/</sup>

Visitor Expenditures: \$253.0 million  
 Primary Purpose of Stay: Pleasure (151,275) vs. MCI (9,384)  
 Average Length of Stay: 6.15 days  
 First Time Visitors: 27.3%  
 Repeat Visitors: 72.7%

JAPAN MMA (by Air)	2019	2020	2021	2022	2023P	2024 Annual Forecast*	YTD Mar. 2024P	YTD Mar. 2023P	% Change
Visitor Expenditures (\$ Millions)	2,248.3	NA	65.1	359.4	899.8	1,445.2	253.0	163.2	55.0%
Visitor Days	9,306,767	1,719,843	294,720	1,526,608	3,767,157	5,932,051	1,055,321	694,241	52.0%
Arrivals	1,576,205	289,137	18,936	192,562	572,979	956,782	171,539	98,994	73.3%
Average Daily Census	25,498	4,699	807	4,182	10,321	16,208	11,597	7,714	50.3%
Per Person Per Day Spending (\$)	241.6	NA	220.9	235.4	238.8	243.6	239.7	235.1	2.0%
Per Person Per Trip Spending (\$)	1,426.4	NA	3,438.8	1,866.4	1,570.4	1,510.5	1,474.7	1,648.4	-10.5%
Length of Stay (days)	5.90	5.95	15.56	7.93	6.57	6.20	6.15	7.01	-12.3%

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).

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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 quarter of 2024, there were 171,539 visitors from Japan, compared to 98,994 visitors (+73.3%) in the first quarter of 2023 and 374,929 visitors (-54.2%) in the first quarter of 2019. Visitors from Japan spent \$253.0 million in the first quarter of 2024, compared to \$163.2 million (+55.0%) in the first quarter of 2023 and \$524.1 million (-51.7%) in the first quarter of 2019.
- In the first quarter of 2024, 1,212 scheduled flights with 354,143 seats serviced Hawai'i from Japan. In the first quarter of 2023, there were 818 scheduled flights (+48.2%) with 216,426 seats (+63.6%). In the first quarter of 2019 there were 2,022 scheduled flights (-40.1%) with 505,898 seats (-30.0%).
- 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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- According to the Japan National Tourism Organization (JNTO), the estimated number of Japanese departing Japan in February 2024 was 978,900 people. This was 63.8 percent of February 2019 level (1,534,792 people) and was more than 100,000 people from January 2024 (838,581 people) and recovery continues gradually.
- The number of Japanese departing from Haneda Airport (flights: +28.9% to 4,178, seats: +22.6% to 1,017,974) and Fukuoka Airport (flights: +13.5% to 1,750, seats: +13.2% to 367,379), exceeded 2019 levels. Other major airports are also recovering, with Narita Airport and Kansai Airport recovering to just under 90 percent of 2019 levels.
- According to a survey conducted by Konan Epidemic Control Co., Ltd. of 1,017 working adults nationwide on "Popular Overseas Travel Destinations for FY2024", Hawai'i (44.3%) was the most popular destination, followed by South Korea (35.7%) and Taiwan (35.5%).
- According to Expedia data, the number of searches for international travel for this golden week was 136 percent higher than 2023. In the search ranking of popular overseas travel destinations during golden week, the top three destinations were Seoul, Taipei, and Bangkok. Hawai'i followed in fourth place. Comparing the number of searches between last year and this year's golden week, Guam, which has increased in direct flights from April, and Los Angeles, the home of a team with a high-profile Japanese baseball player, were ranked among the most popular destinations with the largest increase in search volume.

- JATA announced on March 21, 2024, that it will hold a "U.S. Travel Planning Contest" to stimulate demand for overseas travel among young people, taking advantage of the "U.S.-Japan Tourism Exchange Year 2024" signed between the governments of the U.S. and Japan. The contest is open to students enrolled in universities, junior colleges, and vocational schools nationwide to enter travel products that can stimulate and create demand for travel to the United States among their generation. The final judging will be held at Tourism Expo Japan in September 2024 and the grand prize winner will receive a plaque, support of up to 500,000 yen for travel expenses to the sightseeing spot of the submitted project, and a round-trip air ticket to Honolulu.
- Hawaiian Airlines will increase its Fukuoka - Honolulu route by adding flights on Thursdays from Fukuoka and Wednesdays from Honolulu starting August 1, 2024.
- ANA will start a time sale on international flight tickets from March 18 - 31, 2024 starting at 84,000 yen for economy class and 134,000 yen for premium economy, with a boarding period from April 1 - July 17, 2024 (not applicable during the golden week period from April 26 – 29, 2024).

## Distribution by Island

JAPAN MMA (by Air)	2019	2020	2021	2022	2023P	YTD Mar. 2024P	YTD Mar. 2023P	% Change
O'ahu	1,492,753	269,402	18,001	186,609	558,117	167,624	96,844	73.1%
Maui County	48,524	8,265	775	5,710	11,854	3,341	2,611	27.9%
Maui	46,684	7,929	766	5,408	11,244	3,039	2,461	23.5%
Moloka'i	1,941	416	16	179	580	369	193	90.9%
Lāna'i	2,300	128	19	301	547	55	133	-58.5%
Kaua'i	25,333	3,622	361	2,958	5,811	1,591	1,346	18.2%
Island of Hawai'i	170,686	35,453	1,000	15,510	43,141	11,826	6,911	71.1%

## 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>354,143</b>	<b>341,043</b>	<b>357,497</b>	<b>372,210</b>	<b>1,424,893</b>	<b>216,426</b>	<b>236,924</b>	<b>286,768</b>	<b>323,505</b>	<b>1,063,623</b>	<b>63.6</b>	<b>43.9</b>	<b>24.7</b>	<b>15.1</b>	<b>34.0</b>
Fukuoka	10,842	10,842	13,344	14,456	49,484	0	7,506	11,120	10,564	29,190		44.4	20.0	36.8	69.5
Nagoya	12,428	12,428	12,428	19,598	56,882	4,007	3,107	7,385	10,809	25,308	210.2	300.0	68.3	81.3	124.8
Osaka	40,833	40,833	41,350	45,652	168,668	28,512	31,785	35,130	39,626	135,053	43.2	28.5	17.7	15.2	24.9
Tokyo HND	139,628	129,742	134,574	135,408	539,352	88,113	95,079	104,972	130,590	418,754	58.5	36.5	28.2	3.7	28.8
Tokyo NRT	150,412	147,198	155,801	157,096	610,507	95,794	99,447	128,161	131,916	455,318	57.0	48.0	21.6	19.1	34.1

Scheduled flights	2024					2023					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
<b>JAPAN</b>	<b>1,212</b>	<b>1,160</b>	<b>1,230</b>	<b>1,338</b>	<b>4,940</b>	<b>818</b>	<b>856</b>	<b>1,017</b>	<b>1,132</b>	<b>3,823</b>	<b>48.2</b>	<b>35.5</b>	<b>20.9</b>	<b>18.2</b>	<b>29.2</b>
Fukuoka	39	39	48	52	178	0	27	40	38	105		44.4	20.0	36.8	69.5
Nagoya	52	52	52	82	238	20	13	36	47	116	160.0	300.0	44.4	74.5	105.2
Osaka	156	156	158	176	646	108	121	136	152	517	44.4	28.9	16.2	15.8	25.0
Tokyo HND	558	523	541	544	2,166	368	378	414	521	1,681	51.6	38.4	30.7	4.4	28.9
Tokyo NRT	407	390	431	484	1,712	322	317	391	374	1,404	26.4	23.0	10.2	29.4	21.9

Source: DBEDT analysis from Diio Mi flight schedules as of April 19, 2024, subject to change.

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

JAPAN MMA (by Air)	2019	2020	2021	2022	2023P	YTD Mar. 2024P	YTD Mar. 2023P	% Change
Group vs True Independent (Net)								
Group Tour	246,490	NA	204	12,941	71,583	19,965	9,063	120.3%
True Independent (Net)	594,917	NA	18,155	143,576	330,437	93,223	62,993	48.0%
Leisure vs Business								
Pleasure (Net)	1,360,644	247,980	13,254	158,823	490,202	151,275	87,422	73.0%
MCI (Net)	85,595	18,464	563	8,542	40,711	9,384	5,219	79.8%
Convention/Conf.	12,527	3,983	135	2,214	4,703	858	999	-14.2%
Corp. Meetings	4,068	951	368	981	1,909	219	382	-42.8%
Incentive	70,254	13,922	75	5,712	34,625	8,329	3,924	112.3%

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 Mar. 2024P	YTD Mar. 2023P	% Change
First Time Visitors (%)	31.7	NA	14.2	21.4	26.0	27.3	22.8	4.5
Repeat Visitors (%)	68.3	NA	85.8	78.6	74.0	72.7	77.2	-4.5

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 Mar. 2024P	YTD Mar. 2023P	% Change
State tax revenue generated (\$ Millions) <sup>2/</sup>	262.43	NA	7.60	41.69	104.37	29.34	18.93	55.0%

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