



Japan Fact Sheet

Japan Overview

The Hawai'i Tourism Authority selected a.link LLC for Brand Marketing and Management Services in Japan. In 2023, HTJ continues to target and educate pono travelers to Mālama Hawai'i, promote Hawai'i's unique brand story on Hawaiian culture, local community and natural beauty, and leverage its extensive network to create initiatives that pivot towards regenerative tourism.

Year-to-date July 2023 Quick Facts^{1/}

Visitor Expenditures: \$427.5 million
 Primary Purpose of Stay: Pleasure (230,015) vs. MCI (18,344)
 Average Length of Stay: 6.73 days
 First Time Visitors: 25.7%
 Repeat Visitors: 74.3%

JAPAN MMA (by Air)	2019	2020	2021	2022	2023 Annual Forecast*	YTD July 2023P	YTD July 2022	% Change
Visitor Expenditures (\$ Millions)	2,248.3	NA	65.1	359.4	1,098.9	427.5	107.7	297.0%
Visitor Days	9,306,767	1,719,843	294,720	1,526,608	4,673,774	1,797,709	455,370	294.8%
Arrivals	1,576,205	289,137	18,936	192,562	662,947	267,131	48,799	447.4%
Average Daily Census	25,498	4,699	807	4,182	12,805	8,480	2,148	294.8%
Per Person Per Day Spending (\$)	241.6	NA	220.9	235.4	235.1	237.8	236.5	0.6%
Per Person Per Trip Spending (\$)	1,426.4	NA	3,438.8	1,866.4	1,657.7	1,600.3	2,206.6	-27.5%
Length of Stay (days)	5.90	5.95	15.56	7.93	7.05	6.73	9.33	-27.9%

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 2, 2023).

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^{1/} 2023 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

- In the first seven months of 2023, there were 267,131 visitors from Japan, compared to 48,799 visitors (+447.4%) in the first seven months of 2022 and 868,821 visitors (-69.3%) in the first seven months of 2019, prior to the COVID-19 pandemic.
- Visitors from Japan spent \$427.5 million in the first seven months of 2023, compared to \$107.7 million (+297.0%) in the first seven months of 2022 and \$1.22 billion (-64.9%) in the first seven months of 2019. Daily visitor spending in the first seven months of 2023 was \$238 per person, compared to \$236 per person (+0.6%) in the first seven months of 2022 and \$240 per person (-0.8%) in the first seven months of 2019.
- In first seven months of 2023, there were 1,982 scheduled flights with 539,740 seats from Japan. Air capacity was much greater compared to the first seven months of 2022 (639 flights, +210.2%, with 147,433 seats, +266.1%) but remained below the first seven months of 2019 (4,529 flights, -56.2%, with 1,146,682 seats, -52.9%).
- In 2022, there were 192,562 visitors from Japan compared to 1,576,205 visitors (-87.8%) in 2019. Visitors from Japan spent \$359.4 million in 2022 compared to \$2.25 billion (-84.0%) in 2019. Daily visitor spending in 2022 decreased to \$235 per person from \$242 per person (-2.5%) in 2019.
- In 2022, there were 1,928 scheduled flights with 479,146 seats from Japan compared to 7,696 flights (-74.9%) with 1,999,204 seats (-76.0%) in 2019.
- In 2021, 18,936 visitors arrived from Japan. In comparison, there were 289,137 visitors (-93.5%) from Japan in 2020 and 1,576,205 visitors (-98.8%) in 2019. Total visitor spending in 2021 was \$65.1 million, a 97.1 percent drop from \$2.25 billion in 2019. Comparative 2020 visitor spending data was not available.
- In 2021, there were 529 scheduled flights with 131,766 seats from Japan. In comparison, there were 1,787 flights with 483,574 seats in 2020 and 7,696 flights with 1,999,204 seats in 2019.

Market Conditions

- Japan GDP for the April-June 2023 was +1.8 percent year-over-year, boosted by a recovery in exports, which fell in the January-March 2023 period, and capital investment.
- Consumer spending was positively affected by the recovery of economic activity, which led to an increase in consumption of services such as eating out and travel, and a 0.1% year-over-year increase in consumer spending.
- The average land price in Japan rose 1.5 percent in 2023 from a year earlier for the second consecutive year of increase, which is one of the signs of the economy recovering from the pandemic.
- Japan's economy is likely to continue recovering moderately, supported by factors such as the materialization of pent-up demand, although it is expected to be under downward pressure stemming from a slowdown in the pace of recovery in overseas economies. Thereafter, as a virtuous cycle from income to spending gradually intensifies, Japan's economy is projected to continue growing at a pace above its potential growth rate.
- According to the July 2023 Survey of Consumption Trends, the consumer attitude index (households of two or more persons), which indicates consumer sentiment, rose 0.9 points from

the previous month to 37.1. The increase was the fifth month in a row that the survey has upgraded the sentiment to "showing signs of improvement" from "recovering".

- According to JTB summer vacation travel trends survey, overseas travel is expected to recover to 1.2 million, double last year's level and 40 percent of the 2019 level. Domestic travel has recovered to pre-COVID levels, and with rising incomes and bonuses showing a positive trend this summer.
- The number of passengers used direct flight from Japan to Honolulu in June 2023 was 71,750, with 65% of them were Japanese. The average load factor of the four airlines currently in operation, ANA, HAL, JAL, and ZIPAIR, was 90.8 percent.
- Air Capacity:
 - All Nippon Airlines (ANA): Currently operating double daily flights from Narita and Haneda. For summer vacation period (7/21-9/31), ANA is increasing to triple daily flights.
 - Hawaiian Airlines: Currently operating 6 times from Haneda, Narita, and Kansai (KIX), and 3 times a week from Fukuoka. Services between Japan and Honolulu will be increased from August 7 to 19.
 - Japan Airlines: Flights from Narita and Haneda have been operating daily. Flights from Kansai are 3 times a week and from Centrair once a week. For the summer period, flights will increase in response to the growing demand for Hawai'i travel.
 - ZIPAIR: Currently operating 3 flights a week from Narita. For the summer period (7/28 to 8/25), the carrier will increase flights for Honolulu.

Distribution by Island

JAPAN MMA (by Air)	2019	2020	2021	2022	YTD July 2023P	YTD July 2022	% Change
O'ahu	1,492,753	269,402	18,001	186,609	260,612	46,823	456.6%
Maui County	48,524	8,265	775	5,710	6,487	1,875	246.0%
Maui	46,684	7,929	766	5,408	6,127	1,720	256.1%
Moloka'i	1,941	416	16	179	332	61	442.5%
Lāna'i	2,300	128	19	301	307	181	69.7%
Kaua'i	25,333	3,622	361	2,958	3,057	978	212.6%
Island of Hawai'i	170,686	35,453	1,000	15,510	18,901	3,744	404.8%

Airlift: Scheduled Seats and Flights

Scheduled seats	2023					2022					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
JAPAN	216,426	236,924	287,841	355,744	1,096,935	51,243	64,306	161,113	202,484	479,146	322.4	268.4	78.7	75.7	128.9
Fukuoka		7,506	11,120	13,344	31,970		0	0	0	0	NA	NA	NA	NA	NA
Nagoya	4007	3107	7385	15540	30,039	0	0	2587	3344	5,931	NA	NA	185.5	364.7	406.5
Osaka	28,512	31,785	35,925	43,044	139,266	3,809	3,614	21,336	27,861	56,620	648.5	779.5	68.4	54.5	146.0
Tokyo HND	88,113	95,079	104,972	147,152	435,316	14,946	20,530	66,995	84,574	187,045	489.5	363.1	56.7	74.0	132.7
Tokyo NRT	95,794	99,447	128,439	136,664	460,344	32,488	40,162	70,195	86,705	229,550	194.9	147.6	83.0	57.6	100.5

Scheduled flights	2023					2022					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
JAPAN	818	856	1,021	1,303	3,998	236	277	642	773	1,928	246.6	209.0	59.0	68.6	107.4
Fukuoka		27	40	48	115		0	0	0	0	NA	NA	NA	NA	NA
Nagoya	20	13	36	76	145	0	0	13	17	30	NA	NA	176.9	347.1	383.3
Osaka	108	121	139	172	540	14	13	83	105	215	671.4	830.8	67.5	63.8	151.2
Tokyo HND	368	378	414	580	1,740	70	98	285	357	810	425.7	285.7	45.3	62.5	114.8
Tokyo NRT	322	317	392	427	1,458	152	166	261	294	873	111.8	91.0	50.2	45.2	67.0

Source: DBEDT analysis from Diio Mi flight schedules as of August 25, 2023, subject to change.

Group vs. True Independent; Leisure vs. Business

JAPAN MMA (by Air)	2019	2020	2021	2022	YTD July 2023P	YTD July 2022	% Change
Group vs True Independent (Net)							
Group Tour	246,490	NA	204	12,941	30,263	3,102	875.5%
True Independent (Net)	594,917	NA	18,155	143,576	158,353	38,846	307.6%
Leisure vs Business							
Pleasure (Net)	1,360,644	247,980	13,254	158,823	230,015	38,567	496.4%
MCI (Net)	85,595	18,464	563	8,542	18,344	2,939	524.2%
Convention/Conf.	12,527	3,983	135	2,214	2,033	914	122.5%
Corp. Meetings	4,068	951	368	981	1,060	412	157.5%
Incentive	70,254	13,922	75	5,712	15,429	1,789	762.4%

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	YTD July 2023P	YTD July 2022	% Change
First Time Visitors (%)	31.7	NA	14.2	21.4	25.7	21.4	4.3
Repeat Visitors (%)	68.3	NA	85.8	78.6	74.3	78.6	-4.3

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.

Tax Revenue

JAPAN MMA (by Air)	2019	2020	2021	2022	YTD July 2023P	YTD July 2022	% Change
State tax revenue generated (\$ Millions) ^{2/}	262.43	NA	7.60	41.69	49.59	12.57	294.5%

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