



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 November 2023 Quick Facts^{1/}

Visitor Expenditures: \$793.7 million
Primary Purpose of Stay: Pleasure (437,261) vs. MCI (35,832)
Average Length of Stay: 6.57 days
First Time Visitors: 26.2%
Repeat Visitors: 73.8%

JAPAN MMA (by Air)	2019	2020	2021	2022	2023 Annual Forecast*	YTD Nov. 2023P	YTD Nov. 2022	% Change
Visitor Expenditures (\$ Millions)	2,248.3	NA	65.1	359.4	899.1	793.7	301.6	163.2%
Visitor Days	9,306,767	1,719,843	294,720	1,526,608	3,785,071	3,323,536	1,277,327	160.2%
Arrivals	1,576,205	289,137	18,936	192,562	569,361	505,574	157,421	221.2%
Average Daily Census	25,498	4,699	807	4,182	10,370	9,951	3,824	160.2%
Per Person Per Day Spending (\$)	241.6	NA	220.9	235.4	237.5	238.8	236.1	1.2%
Per Person Per Trip Spending (\$)	1,426.4	NA	3,438.8	1,866.4	1,579.1	1,570.0	1,915.6	-18.0%
Length of Stay (days)	5.90	5.95	15.56	7.93	6.65	6.57	8.11	-19.0%

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).

Contact Information

Hawai'i Tourism Authority: Jadie Goo, Sr. Brand Manager
Tel: (808) 973-2252
jadie@gohta.net

Hawai'i Tourism Japan: Eric Takahata, Managing Director
Tel: (808) 942-4114
etakahata@htjapan.jp

^{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 11 months of 2023, there were 505,574 visitors from Japan, compared to 157,421 visitors (+221.2%) in the first 11 months of 2022 and 1,439,570 visitors (-64.9%) in the first 11 months of 2019, prior to the COVID-19 pandemic.
- Visitors from Japan spent \$793.7 million in the first 11 months of 2023, compared to \$301.6 million (+163.2%) in the first 11 months of 2022 and \$2.04 billion (-61.0%) in the first 11 months of 2019. Daily visitor spending in the first 11 months of 2023 was \$239 per person, higher than the first 11 months of 2022 (\$236 per person, +1.2%), but slightly less than the first 11 months of 2019 (\$240 per person, -0.4%).
- In the first 11 months of 2023, there were 3,415 scheduled flights with 945,249 seats from Japan. Air capacity was much greater compared to the first 11 months of 2022 (1,632 flights, +109.3%, with 400,133 seats, +136.2%) but remained below the first 11 months of 2019 (7,052 flights, -51.6%, with 1,825,761 seats, -48.2%).
- 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's consumer price index rose 2.9 percent in October 2023, increasing for the first time in four months.
- The real GDP growth rate for July-September 2023 fell 0.5 percent year-over-year for the first time in three quarters. This is a speed-adjustment move amid a moderate economic recovery and does not suggest that the economy is buckling. The recovery trend has been maintained, and the economy is likely to return to growth again from October to December 2023 onward.
- Japan National Tourism Organization (JNTO) reported that there 937,700 Japanese overseas travelers in October 2023, a 56.4 percent recovery compared to October 2019.
- According to OAG, the number of international flights departing from six major airports in Japan (Narita, Haneda, Kansai, Nagoya, Fukuoka, and Sapporo) in October 2023 recovered 80.9 percent and available seats recovered 81.5 percent compared to October 2019. Double-digit growths in both flights and seats were seen in Haneda and Fukuoka.
- Expedia and Hotels.com announced the international travel trends for this 2023 year-end and New Year's holidays and found that Taipei was the most popular international travel destination, followed by Honolulu, Seoul, Bangkok, and Taiwan (excluding Taipei), but Hawai'i ranked first as

the ideal destination when not considering costs, indicating that, unlike actual search rankings, many people would like to visit distant destinations outside Asia.

- According to TripAdvisor's winter 2023 travel trends survey, 59 percent of Japanese travelers are planning to take leisure trips in 2024. Honolulu ranked first among popular overseas destinations, and despite concerns about the weak yen and rising fuel prices, the majority of Japanese travelers said their travel expenses compared to last year's winter trip would increase or remain the same, indicating that travel is a high priority for them.
- Watabe Wedding released the results of its survey on honeymoon and photo weddings, which asked 400 people in their 20s and 30s about their honeymoon plans. 80 percent of the respondents wanted a honeymoon, and Hawai'i was the No. 1 destination they wanted to go to. The survey revealed that approximately 70 percent of the respondents are considering having a photo wedding session at their honeymoon destination.
- Korean Air announced on November 6, 2023, to resume its Seoul (Incheon) - Honolulu service via Narita on April 26, 2024, after a four-year absence. The route will be operated with seven roundtrips per week (one round-trip per day). The aircraft is a Boeing 777-200 and has 261 seats in two classes, 36 in business and 225 in economy.

Distribution by Island

JAPAN MMA (by Air)	2019	2020	2021	2022	YTD Nov. 2023P	YTD Nov. 2022	% Change
O'ahu	1,492,753	269,402	18,001	186,609	491,342	152,704	221.8%
Maui County	48,524	8,265	775	5,710	10,301	4,503	128.8%
Maui	46,684	7,929	766	5,408	9,791	4,303	127.5%
Moloka'i	1,941	416	16	179	580	115	405.4%
Lāna'i	2,300	128	19	301	448	262	71.1%
Kaua'i	25,333	3,622	361	2,958	5,480	2,560	114.0%
Island of Hawai'i	170,686	35,453	1,000	15,510	38,996	12,611	209.2%

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	286,768	324,794	1,064,912	51,243	64,306	161,113	202,484	479,146	322.4	268.4	78.0	60.4	122.3
Fukuoka		7,506	11,120	10,842	29,468		0	0	0	0		NA	NA	NA	NA
Nagoya	4007	3107	7385	10809	25,308	0	0	2587	3344	5,931	NA	NA	185.5	223.2	326.7
Osaka	28,512	31,785	35,130	40,182	135,609	3,809	3,614	21,336	27,861	56,620	648.5	779.5	64.7	44.2	139.5
Tokyo HND	88,113	95,079	104,972	130,806	418,970	14,946	20,530	66,995	84,574	187,045	489.5	363.1	56.7	54.7	124.0
Tokyo NRT	95,794	99,447	128,161	132,155	455,557	32,488	40,162	70,195	86,705	229,550	194.9	147.6	82.6	52.4	98.5

Scheduled flights	2023					2022					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
JAPAN	818	856	1,017	1,137	3,828	236	277	642	773	1,928	246.6	209.0	58.4	47.1	98.5
Fukuoka		27	40	39	106		0	0	0	0		NA	NA	NA	NA
Nagoya	20	13	36	47	116	0	0	13	17	30	NA	NA	176.9	176.5	286.7
Osaka	108	121	136	154	519	14	13	83	105	215	671.4	830.8	63.9	46.7	141.4
Tokyo HND	368	378	414	522	1,682	70	98	285	357	810	425.7	285.7	45.3	46.2	107.7
Tokyo NRT	322	317	391	375	1,405	152	166	261	294	873	111.8	91.0	49.8	27.6	60.9

Source: DBEDT analysis from Diio Mi flight schedules as of November 22, 2023, subject to change.

Group vs. True Independent; Leisure vs. Business

JAPAN MMA (by Air)	2019	2020	2021	2022	YTD Nov. 2023P	YTD Nov. 2022	% Change
Group vs True Independent (Net)							
Group Tour	246,490	NA	204	12,941	62,259	9,951	525.7%
True Independent (Net)	594,917	NA	18,155	143,576	292,495	120,118	143.5%
Leisure vs Business							
Pleasure (Net)	1,360,644	247,980	13,254	158,823	437,261	132,622	229.7%
MCI (Net)	85,595	18,464	563	8,542	35,832	6,394	460.4%
Convention/Conf.	12,527	3,983	135	2,214	4,034	1,827	120.7%
Corp. Meetings	4,068	951	368	981	1,707	827	106.3%
Incentive	70,254	13,922	75	5,712	30,508	3,987	665.1%

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 Nov. 2023P	YTD Nov. 2022	% Change
First Time Visitors (%)	31.7	NA	14.2	21.4	26.2	21.2	5.0
Repeat Visitors (%)	68.3	NA	85.8	78.6	73.8	78.8	-5.0

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 Nov. 2023P	YTD Nov. 2022	% Change
State tax revenue generated (\$ Millions) ^{2/}	262.43	NA	7.60	41.69	92.07	35.20	161.6%

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