



# 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 December 2023 Quick Facts<sup>1/</sup>

Visitor Expenditures: \$899.8 million  
 Primary Purpose of Stay: Pleasure (490,202) vs. MCI (40,711)  
 Average Length of Stay: 6.57 days  
 First Time Visitors: 26.0%  
 Repeat Visitors: 74.0%

| JAPAN MMA (by Air)                 | 2019      | 2020      | 2021    | 2022      | 2023 Annual Forecast* | YTD Dec. 2023P | YTD Dec. 2022 | % Change |
|------------------------------------|-----------|-----------|---------|-----------|-----------------------|----------------|---------------|----------|
| Visitor Expenditures (\$ Millions) | 2,248.3   | NA        | 65.1    | 359.4     | 899.1                 | 899.8          | 359.4         | 150.4%   |
| Visitor Days                       | 9,306,767 | 1,719,843 | 294,720 | 1,526,608 | 3,785,071             | 3,767,157      | 1,526,608     | 146.8%   |
| Arrivals                           | 1,576,205 | 289,137   | 18,936  | 192,562   | 569,361               | 572,979        | 192,562       | 197.6%   |
| Average Daily Census               | 25,498    | 4,699     | 807     | 4,182     | 10,370                | 10,321         | 4,182         | 146.8%   |
| Per Person Per Day Spending (\$)   | 241.6     | NA        | 220.9   | 235.4     | 237.5                 | 238.8          | 235.4         | 1.5%     |
| Per Person Per Trip Spending (\$)  | 1,426.4   | NA        | 3,438.8 | 1,866.4   | 1,579.1               | 1,570.4        | 1,866.4       | -15.9%   |
| Length of Stay (days)              | 5.90      | 5.95      | 15.56   | 7.93      | 6.65                  | 6.57           | 7.93          | -17.1%   |

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).

## Contact Information

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<sup>1/</sup> 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

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- For all of 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, prior to the COVID-19 pandemic.
- 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%).
- In 2022, there were 192,562 visitors from Japan compared to 18,936 visitors in 2021, 289,137 visitors in 2020 and 1,576,205 visitors in 2019. Total visitor spending was \$359.4 million in 2022 compared to \$65.1 million in 2021 and \$2.25 billion in 2019.
- In 2022, there were 1,928 scheduled flights with 479,146 seats from Japan. There was reduced air service from Japan in 2021 with 529 scheduled flights and 131,766 seats. In 2020, there were 1,787 scheduled flights with 483,574 seats. Direct service from Japan was suspended in May and June 2020, and there was limited air service for the rest of 2020 due to the pandemic. In 2019 there were 7,696 flights with 1,999,204 seats.

## Market Conditions

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- The Japanese economy grew at an annualized 1.9 percent in October 2023 from the previous month, marking the fastest expansion in more than a year, according to estimates by the Japan Center for Economic Research. Leading that growth were exports of goods and services, which increased 8.9 percent in October 2023, compared with a 2.5 percent expansion in September 2023.
- According to the Japan National Tourism Organization, there were an estimated 1,027,100 Japanese departing Japan in November 2023, down 37.5 percent from 2019 (1,642,333 departures).
- International flights departed from Japan's six major airports (Narita, Kansai, Haneda, Fukuoka, Nagoya, and Sapporo) in November 2023 decreased 16.7 percent from 2019 to 17,338 flights, and the number of seats decreased 15.7 percent to 408,080 seats.
- Narita International Airport Company estimated total passenger volume for the 14-day period during the year-end and New Year holidays (December 22, 2023, to January 4, 2024) at 1,141,900 passengers, up 74.8 percent from 2022, and down 17.7 percent from 2019 for international flights. International flights recovered to 80 percent of the pre-COVID-19 level.
- JTB recently conducted a survey for the year-end and New Year (December 23, 2023 - January 3, 2024). When asked about future overseas travel intentions by destination, Hawai'i was the most popular choice at 14.3 percent, followed by Europe (12.7%), Australia/New Zealand (11.8%), Taiwan (10.9%), Mainland U.S. (10.0%), South Korea (9.6%), and Guam/Saipan (9.1%).

- JAL and ANA announced a reduction of fuel surcharges applicable to tickets issued between February 1 and February 29, 2024. For the Japan-Hawai'i route, the surcharge will be reduced from the current 30,500 yen to 28,200 yen for JAL, and 26,500 yen to 24,500 yen for ANA (one-way trip).

## Distribution by Island

| JAPAN MMA (by Air) | 2019      | 2020    | 2021   | 2022    | YTD Dec. 2023P | YTD Dec. 2022 | % Change |
|--------------------|-----------|---------|--------|---------|----------------|---------------|----------|
| O'ahu              | 1,492,753 | 269,402 | 18,001 | 186,609 | 558,117        | 186,609       | 199.1%   |
| Maui County        | 48,524    | 8,265   | 775    | 5,710   | 11,854         | 5,710         | 107.6%   |
| Maui               | 46,684    | 7,929   | 766    | 5,408   | 11,244         | 5,408         | 107.9%   |
| Moloka'i           | 1,941     | 416     | 16     | 179     | 580            | 179           | 224.1%   |
| Lāna'i             | 2,300     | 128     | 19     | 301     | 547            | 301           | 81.9%    |
| Kaua'i             | 25,333    | 3,622   | 361    | 2,958   | 5,811          | 2,958         | 96.4%    |
| Island of Hawai'i  | 170,686   | 35,453  | 1,000  | 15,510  | 43,141         | 15,510        | 178.2%   |

## 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    | YTD Dec. 2023P | YTD Dec. 2022 | % Change |
|---------------------------------|-----------|---------|--------|---------|----------------|---------------|----------|
| Group vs True Independent (Net) |           |         |        |         |                |               |          |
| Group Tour                      | 246,490   | NA      | 204    | 12,941  | 71,583         | 12,941        | 453.1%   |
| True Independent (Net)          | 594,917   | NA      | 18,155 | 143,576 | 330,437        | 143,576       | 130.1%   |
| Leisure vs Business             |           |         |        |         |                |               |          |
| Pleasure (Net)                  | 1,360,644 | 247,980 | 13,254 | 158,823 | 490,202        | 158,823       | 208.6%   |
| MCI (Net)                       | 85,595    | 18,464  | 563    | 8,542   | 40,711         | 8,542         | 376.6%   |
| Convention/Conf.                | 12,527    | 3,983   | 135    | 2,214   | 4,703          | 2,214         | 112.4%   |
| Corp. Meetings                  | 4,068     | 951     | 368    | 981     | 1,909          | 981           | 94.5%    |
| Incentive                       | 70,254    | 13,922  | 75     | 5,712   | 34,625         | 5,712         | 506.2%   |

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.

## First Timers vs. Repeat Visitors

| JAPAN MMA (by Air)      | 2019 | 2020 | 2021 | 2022 | YTD Dec.<br>2023P | YTD Dec.<br>2022 | % Change |
|-------------------------|------|------|------|------|-------------------|------------------|----------|
| First Time Visitors (%) | 31.7 | NA   | 14.2 | 21.4 | 26.0              | 21.4             | 4.6      |
| Repeat Visitors (%)     | 68.3 | NA   | 85.8 | 78.6 | 74.0              | 78.6             | -4.6     |

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  | YTD Dec.<br>2023P | YTD Dec.<br>2022 | %<br>Change |
|---|--------|------|------|-------|-------------------|------------------|-------------|
| State tax revenue generated (\$ Millions) <sup>2/</sup> | 262.43 | NA   | 7.60 | 41.69 | 104.37            | 41.69            | 150.4%      |

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