



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

Visitor Expenditures:	\$394.0 million
Primary Purpose of Stay:	Pleasure (236,052) vs. MCI (14,111)
Average Length of Stay:	6.18 days
First Time Visitors:	27.7%
Repeat Visitors:	72.3%

JAPAN MMA (by Air)	2019	2020	2021	2022	2023P	2024 Annual Forecast*	YTD May 2024P	YTD May 2023P	% Change
Visitor Expenditures (\$ Millions)	2,248.3	NA	65.1	359.4	899.8	1,130.3	394.0	274.9	43.4%
Visitor Days	9,306,767	1,719,843	294,720	1,526,608	3,767,157	4,729,243	1,649,408	1,163,161	41.8%
Arrivals	1,576,205	289,137	18,936	192,562	572,979	770,235	266,687	167,493	59.2%
Average Daily Census	25,498	4,699	807	4,182	10,321	12,921	10,851	7,703	40.9%
Per Person Per Day Spending (\$)	241.6	NA	220.9	235.4	238.8	239.0	238.9	236.3	1.1%
Per Person Per Trip Spending (\$)	1,426.4	NA	3,438.8	1,866.4	1,570.4	1,467.5	1,477.6	1,641.1	-10.0%
Length of Stay (days)	5.90	5.95	15.56	7.93	6.57	6.14	6.18	6.94	-10.9%

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) 2024 annual forecast (Quarter 2, 2024).

## Contact Information

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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 five months of 2024, there were 266,687 visitors from Japan, compared to 167,493 visitors (+59.2%) in the first five months of 2023 and 607,643 visitors (-56.1%) in the first five months of 2019. Visitors from Japan spent \$394.0 million in the first five months of 2024, compared to \$274.9 million (+43.4%) in the first five months of 2023 and \$850.4 million (-53.7%) in the first five months of 2019. Daily visitor spending in the first five months of 2024 (\$239 per person) increased slightly compared to the first five months of 2023 (\$236 per person, +1.1%) and was similar to the first five months of 2019 (\$239 per person, -0.2%).
- In the first five months of 2024, 1,985 scheduled flights with 581,888 seats serviced Hawai'i from Japan. In the first five months of 2023, there were 1,391 scheduled flights (+42.7%) with 374,296 seats (+55.5 %). In the first five months of 2019 there were 3,297 scheduled flights (-39.8%) with 825,902 seats (-29.5%).
- 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 Wage Trend Index Service, the year-over-year increase in the index of wages offered to full-time employees was +2.1 percent. Significant increases from March to April 2024 were observed in the hotel/inn/bridal and manufacturing/factory/chemical/food sectors, indicating ongoing wage growth in these areas. In the part-time job category, the advertised wage index increased by 3.5 percent year-over-year, driven notably by the "construction/civil engineering/energy" sector, reflecting labor shortages in that industry.
- In April 2024, the estimated number of Japanese departing from Japan was 888,800, representing a 53.3 percent recovery compared to the same month in 2019 and a significant increase of 58.7 percent from April 2023 (560,183), according to JNTO.
- The Japan Tourism Agency (JTA) released preliminary data on travel handled by 43 major travel agencies in March 2024. The total volume handled amounted to 42,180,420,000 yen, reaching 93.9 percent of the volume recorded in March 2019, a notable improvement from the previous month's 78.1 percent. International travel showed a recovery trend, increasing by 65.6 percent compared to the same month last year and reaching 66.9 percent of the volume recorded in March 2019. The value of package tours recovered to 87.1 percent and the number of travelers to 76.2 percent compared to March 2023. Overseas travel saw a 185 percent increase in value and a 221 percent increase in the number of travelers compared to the previous year, yet only achieved 33 percent and 22.8 percent recovery in value and number of travelers respectively, compared to March 2019.
- According to TripAdvisor's Summer 2024 Travel Trends Survey, 68 percent of respondents plan to travel this summer, a slight increase from the previous year. Between June 1 and August 31, 2024, 68 percent of respondents intend to travel, with 85 percent planning domestic trips, 5

percent opting for overseas destinations, and 10 percent planning both types of travel. Overseas travel plans are affected by the weak yen and other economic factors. The most popular overseas summer destinations are Seoul, South Korea, followed by Honolulu, Hawai'i.

- A survey on global travel trends amidst inflation revealed that one-third of respondents would consider altering their travel plans for a more affordable option, with 52 percent of Japanese respondents indicating a willingness to adjust their itineraries based on price. When choosing destinations, 66 percent of Japanese respondents prioritize landmarks, galleries, museums, and other sights. Recommendations from friends and family influence destination decisions for more than half (52%) of Japanese respondents, followed by TV programs and advertisements (47%). Additionally, 43% of respondents rely on travel booking sites, blogs, and related content.
- Due to yen depreciation, Japanese consumers are increasingly considering alternative beach resort destinations such as Bali, Thailand, and Singapore. However, airlines are focusing their resources on promoting Hawai'i as their primary summer and Quarter 3 destination, with HTJ's "Yappari Hawai'i" promotion collaborating closely with airlines to enhance promotional effectiveness.
- Starting May 1, 2024, Hawaiian Airlines launched a campaign featuring a weekly drawing for a 200,000-mile round-trip ticket (two roundtrips) from Japan to Hawai'i. This campaign coincides with the Lei Day celebration, symbolizing aloha, and extends throughout May as part of the "31 Days of Lei" giveaway. Eligibility is open to residents of Japan aged 18 and above.

## Distribution by Island

JAPAN MMA (by Air)	2019	2020	2021	2022	2023P	YTD May 2024P	YTD May 2023P	% Change
O'ahu	1,492,753	269,402	18,001	186,609	558,117	260,583	163,911	59.0%
Maui County	48,524	8,265	775	5,710	11,854	5,412	3,976	36.1%
Maui	46,684	7,929	766	5,408	11,244	5,092	3,729	36.5%
Moloka'i	1,941	416	16	179	580	398	250	59.4%
Lāna'i	2,300	128	19	301	547	121	188	-35.4%
Kaua'i	25,333	3,622	361	2,958	5,811	2,613	2,030	28.7%
Island of Hawai'i	170,686	35,453	1,000	15,510	43,141	17,771	11,658	52.4%

## 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>340,487</b>	<b>356,167</b>	<b>362,194</b>	<b>1,412,991</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>43.7</b>	<b>24.2</b>	<b>12.0</b>	<b>32.8</b>
Fukuoka	10,842	10,842	11,676	10,842	44,202	0	7,506	11,120	10,564	29,190		44.4	5.0	2.6	51.4
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	129,186	134,574	130,682	534,070	88,113	95,079	104,972	130,590	418,754	58.5	35.9	28.2	0.1	27.5
Tokyo NRT	150,412	147,198	156,139	155,420	609,169	95,794	99,447	128,161	131,916	455,318	57.0	48.0	21.8	17.8	33.8

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>1,158</b>	<b>1,224</b>	<b>1,300</b>	<b>4,894</b>	<b>818</b>	<b>856</b>	<b>1,017</b>	<b>1,132</b>	<b>3,823</b>	<b>48.2</b>	<b>35.3</b>	<b>20.4</b>	<b>14.8</b>	<b>28.0</b>
Fukuoka	39	39	42	39	159	0	27	40	38	105		44.4	5.0	2.6	51.4
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	521	541	527	2,147	368	378	414	521	1,681	51.6	37.8	30.7	1.2	27.7
Tokyo NRT	407	390	431	476	1,704	322	317	391	374	1,404	26.4	23.0	10.2	27.3	21.4

Source: DBEDT analysis from Diio Mi flight schedules as of June 25, 2024, subject to change.

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

JAPAN MMA (by Air)	2019	2020	2021	2022	2023P	YTD May 2024P	YTD May 2023P	% Change
Group vs True Independent (Net)								
Group Tour	246,490	NA	204	12,941	71,583	30,188	15,968	89.1%
True Independent (Net)	594,917	NA	18,155	143,576	330,437	145,935	107,037	36.3%
Leisure vs Business								
Pleasure (Net)	1,360,644	247,980	13,254	158,823	490,202	236,052	146,633	61.0%
MCI (Net)	85,595	18,464	563	8,542	40,711	14,111	9,573	47.4%
Convention/Conf.	12,527	3,983	135	2,214	4,703	1,339	1,483	-9.7%
Corp. Meetings	4,068	951	368	981	1,909	424	668	-36.6%
Incentive	70,254	13,922	75	5,712	34,625	12,375	7,572	63.4%

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	2023P	YTD May 2024P	YTD May 2023P	% Change
First Time Visitors (%)	31.7	NA	14.2	21.4	26.0	27.7	23.5	4.2
Repeat Visitors (%)	68.3	NA	85.8	78.6	74.0	72.3	76.5	-4.2

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.

## Tax Revenue

JAPAN MMA (by Air)	2019	2020	2021	2022	2023P	YTD May 2024P	YTD May 2023P	% Change
State tax revenue generated (\$ Millions) <sup>2/</sup>	262.43	NA	7.60	41.69	104.37	45.71	31.89	43.4%

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