



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 June 2024 Quick Facts^{1/}

Visitor Expenditures:	\$481.4 million
Primary Purpose of Stay:	Pleasure (283,905) vs. MCI (19,094)
Average Length of Stay:	6.18 days
First Time Visitors:	28.8%
Repeat Visitors:	71.2%

JAPAN MMA (by Air)	2019	2020	2021	2022	2023P	2024 Annual Forecast*	YTD June 2024P	YTD June 2023P	% Change
Visitor Expenditures (\$ Millions)	2,248.3	NA	65.1	359.4	899.8	1,130.3	481.4	344.3	39.8%
Visitor Days	9,306,767	1,719,843	294,720	1,526,608	3,767,157	4,729,243	2,017,912	1,454,914	38.7%
Arrivals	1,576,205	289,137	18,936	192,562	572,979	770,235	326,561	214,246	52.4%
Average Daily Census	25,498	4,699	807	4,182	10,321	12,921	11,087	8,038	37.9%
Per Person Per Day Spending (\$)	241.6	NA	220.9	235.4	238.8	239.0	238.5	236.6	0.8%
Per Person Per Trip Spending (\$)	1,426.4	NA	3,438.8	1,866.4	1,570.4	1,467.5	1,474.1	1,606.9	-8.3%
Length of Stay (days)	5.90	5.95	15.56	7.93	6.57	6.14	6.18	6.79	-9.0%

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) 2024 annual forecast (Quarter 2, 2024).

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^{1/} 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

- In the first half of 2024, there were 326,561 visitors from Japan, compared to 214,246 visitors (+52.4%) in the first half of 2023 and 734,235 visitors (-55.5%) in the first half of 2019. Visitors from Japan spent \$481.4 million in the first half of 2024, compared to \$344.3 million (+39.8%) in the first half of 2023 and \$1.03 billion (-53.4%) in the first half of 2019. Daily visitor spending in the first half of 2024 (\$239 per person) increased slightly compared to the first half of 2023 (\$237 per person, +0.8%), but was slightly lower than the first half of 2019 (\$241 per person, -1.0%).
- In the first half of 2024, 2,370 scheduled flights with 694,630 seats serviced Hawai'i from Japan. In the first half of 2023, there were 1,674 scheduled flights (+41.6%) with 453,350 seats (+53.2%). In the first half of 2019 there were 3,907 scheduled flights (-39.3%) with 981,290 seats (-29.2%).
- 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

- The Japanese government's June 2024 Monthly Economic Report maintained the assessment of a "moderately recovering" domestic economic outlook. The Ministry of Internal Affairs and Communications' Labor Force Survey indicated growth in employment, particularly among female workers in official positions. Per capita wages are expected to increase moderately, with a current wage growth rate of 3.7 percent, the highest in 30 years. Consumer spending, notably in services, is recovering steadily post-pandemic.
- According to JNTO, the estimated number of Japanese leaving Japan in April 2024 was 941,700, a 65 percent recovery of same month in 2019, and a 39.4 increase compared to May 2023.
- According to JTB's ranking of popular overseas destinations for the summer vacation period (July 15 - August 31, 2024), Hawai'i ranked first. During the summer vacation period, approximately 65 percent of the total number of reservations were for family trips, and Hawai'i was the most popular destination. South Korea remained the second most popular destination for women, and Singapore was popular among families with junior high school students and younger in third place.
- From the beginning of June 2024, the number of Japanese travelers to Hawai'i has been stable at about 3,000 visitors per day. The trend in reservations continues to be FIT, and wholesalers continue to book and send customers with dynamic packages. Currently, reservations and inquiries are mainly for August, September, and the year-end 2024 and New Year holidays, and the companies are focusing on time sales in cooperation with airlines and sales of packages with special benefit services in order to boost bookings for July 2024, and is working to receive orders for the most recent days.

- Airlines are continuing to invest in Hawai'i, making it a priority destination.
 - All major airlines have launched time-limited sales for the summer vacation period.
 - Hawaiian Airlines and Japan Airlines have both launched new TV commercials promoting Hawai'i to boost bookings for summer and fall.
 - ZIPAIR has partnered with Klook for the "Full Support for Overseas Travel Campaign" running from June 14 to August 31, 2024. During this period, Klook is offering e-gift cards and ZIPAIR points worth 500,000 yen, which can be used to purchase tickets for ZIPAIR-operated flights from Narita to destinations including Seoul, Bangkok, Singapore, Honolulu, Los Angeles, and others, through a social media campaign.

Distribution by Island

JAPAN MMA (by Air)	2019	2020	2021	2022	2023P	YTD June 2024P	YTD June 2023P	% Change
O'ahu	1,492,753	269,402	18,001	186,609	558,117	319,193	209,546	52.3%
Maui County	48,524	8,265	775	5,710	11,854	6,774	5,266	28.6%
Maui	46,684	7,929	766	5,408	11,244	6,345	4,954	28.1%
Moloka'i	1,941	416	16	179	580	458	291	57.4%
Lāna'i	2,300	128	19	301	547	213	268	-20.5%
Kaua'i	25,333	3,622	361	2,958	5,811	3,202	2,582	24.0%
Island of Hawai'i	170,686	35,453	1,000	15,510	43,141	21,623	14,377	50.4%

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
JAPAN	354,143	340,487	356,167	362,194	1,412,991	216,426	236,924	286,768	323,505	1,063,623	63.6	43.7	24.2	12.0	32.8
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
JAPAN	1,212	1,158	1,224	1,300	4,894	818	856	1,017	1,132	3,823	48.2	35.3	20.4	14.8	28.0
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 June 2024P	YTD June 2023P	% Change
Group vs True Independent (Net)								
Group Tour	246,490	NA	204	12,941	71,583	40,381	24,332	66.0%
True Independent (Net)	594,917	NA	18,155	143,576	330,437	174,074	129,900	34.0%
Leisure vs Business								
Pleasure (Net)	1,360,644	247,980	13,254	158,823	490,202	283,905	184,353	54.0%
MCI (Net)	85,595	18,464	563	8,542	40,711	19,094	14,515	31.5%
Convention/Conf.	12,527	3,983	135	2,214	4,703	2,109	1,621	30.1%
Corp. Meetings	4,068	951	368	981	1,909	639	956	-33.2%
Incentive	70,254	13,922	75	5,712	34,625	16,403	12,108	35.5%

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.

First Timers vs. Repeat Visitors

JAPAN MMA (by Air)	2019	2020	2021	2022	2023P	YTD June 2024P	YTD June 2023P	% Change
First Time Visitors (%)	31.7	NA	14.2	21.4	26.0	28.8	25.3	3.6
Repeat Visitors (%)	68.3	NA	85.8	78.6	74.0	71.2	74.7	-3.6

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	2023P	YTD June 2024P	YTD June 2023P	% Change
State tax revenue generated (\$ Millions) ^{2/}	262.43	NA	7.60	41.69	104.37	55.84	39.94	39.8%

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