



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 July 2024 Quick Facts ^{1/}

Visitor Expenditures:	\$582.7 million
Primary Purpose of Stay:	Pleasure (337,261) vs. MCI (23,392)
Average Length of Stay:	6.20 days
First Time Visitors:	28.5%
Repeat Visitors:	71.5%

JAPAN MMA (by Air)	2019	2020	2021	2022	2023	2024 Annual Forecast*	YTD July 2024P	YTD July 2023	% Change
Visitor Expenditures (\$ Millions)	2,248.3	NA	65.1	359.4	930.3	1,130.3	582.7	407.3	43.1%
Visitor Days	9,306,767	1,719,843	294,720	1,526,608	3,864,472	4,729,243	2,438,970	1,709,643	42.7%
Arrivals	1,576,205	289,137	18,936	192,562	589,172	770,235	393,117	255,133	54.1%
Average Daily Census	25,498	4,699	807	4,182	10,588	12,921	11,451	8,064	42.0%
Per Person Per Day Spending (\$)	241.6	NA	220.9	235.4	240.7	239.0	238.9	238.2	0.3%
Per Person Per Trip Spending (\$)	1,426.4	NA	3,438.8	1,866.4	1,578.9	1,467.5	1,482.3	1,596.3	-7.1%
Length of Stay (days)	5.90	5.95	15.56	7.93	6.56	6.14	6.20	6.70	-7.4%

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/} 2024P visitor data are preliminary. 2019 - 2023 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 2024, there were 393,117 visitors from Japan, compared to 255,133 visitors (+54.1%) in the first seven months of 2023 and 868,821 visitors (-54.8%) in the first seven months of 2019. Visitors from Japan spent \$582.7 million in the first seven months of 2024, compared to \$407.3 million (+43.1%) in the first seven months of 2023 and \$1.22 billion (-52.2%) in the first seven months of pre-pandemic 2019.
- In the first seven months of 2024, 2,774 scheduled flights with 812,271 seats serviced Hawai'i from Japan. In the first seven months of 2023, there were 1,982 scheduled flights (+40.0%) with 539,740 seats (+50.5 %). In the first seven months of 2019 there were 4,529 scheduled flights (-38.8%) with 1,146,682 seats (-29.2%).
- In 2023, there were 589,172 visitors from Japan, compared to 192,562 visitors (+206.0%) in 2022 and 1,576,205 visitors (-62.6%) in 2019.
- Visitors from Japan spent \$930.3 million in 2023, compared to \$359.4 million (+158.8%) in 2022 and \$2.25 billion (-58.6%) in 2019. Daily visitor spending in 2023 was \$241 per person, higher than 2022 (\$235 per person, +2.3%), but slightly less than 2019 (\$242 per person, -0.4%).
- 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 Daiwa Institute of Research forecasts Japan's real GDP growth for April-June 2024 at around +2.0 percent, driven by increased personal consumption and capital investment due to a rebound in automobile production.
- The Bank of Japan raised its policy interest rate from 0-0.1 percent to 0.25 percent, effective August 1, 2024. This rate hike caused the yen to briefly strengthen to 1 dollar = 152.85-88 yen, with speculation about further hikes leading to increased yen buying and dollar selling.
- JNTO estimates that 930,200 Japanese traveled abroad in June 2024, which is 61 percent of the number in June 2019 but represents a 32.3 percent increase over June 2023.
- Japanese travel to Hawai'i has stabilized at around 3,000 to 3,800 visitors per day. The July 2024 statistics show that 48.8 percent were FIT travelers and 47 percent were on package tours. Repeat visitors made up 66 percent while first-time visitors increased to 34 percent due to wholesaler packages.
- ANA Holdings reported record first-quarter sales of 516.7 billion yen for April 1 to June 30, 2024, up from 461 billion yen last year. International passenger numbers rose by 16 percent, driving a 13.3 percent increase in passenger revenue. Demand for overseas travel, especially to Hawai'i, has been strong, boosting handling volumes.
- Japan Airlines' seasonal Kona flights in July and August 2024 are performing well, with an 80-90 percent load factor. Sales of flights using sustainable aviation fuel (SAF) are robust, and the airline plans to collaborate with local NPOs for volunteer activities. The joint survey campaign with HTJ, launched in mid-March 2024, has been well-received, with a second round starting in August 2024 to further improve customer satisfaction.
- ZIPAIR is likely to suspend its winter flight schedule from mid-October 2024 through March 2025 due to crew shortages and challenging local airport operations. The airline plans to shift resources to more profitable routes, such as those to South Korea and Los Angeles. Consequently, HTJ's co-op program aimed at expanding operations will be paused, with future promotional strategies to be reassessed based on future developments and opportunities.

Distribution by Island

JAPAN MMA (by Air)	2019	2020	2021	2022	2023	YTD July 2024P	YTD July 2023	% Change
O'ahu	1,492,753	269,402	18,001	186,609	573,719	384,416	248,716	54.6%
Maui County	48,524	8,265	775	5,710	11,927	8,154	6,154	32.5%
Maui	46,684	7,929	766	5,408	11,383	7,662	5,838	31.2%
Moloka'i	1,941	416	16	179	587	484	312	55.1%
Lāna'i	2,300	128	19	301	489	276	274	1.0%
Kaua'i	25,333	3,622	361	2,958	5,885	3,723	2,904	28.2%
Island of Hawai'i	170,686	35,453	1,000	15,510	44,758	26,412	18,186	45.2%

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
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	2023	YTD July 2024P	YTD July 2023	% Change
Group vs True Independent (Net)								
Group Tour	246,490	NA	204	12,941	73,690	48,365	29,068	66.4%
True Independent (Net)	594,917	NA	18,155	143,576	339,436	212,862	150,208	41.7%
Leisure vs Business								
Pleasure (Net)	1,360,644	247,980	13,254	158,823	505,037	337,261	219,746	53.5%
MCI (Net)	85,595	18,464	563	8,542	41,150	23,392	17,235	35.7%
Convention/Conf.	12,527	3,983	135	2,214	4,790	2,545	1,911	33.2%
Corp. Meetings	4,068	951	368	981	1,911	727	1,022	-28.9%
Incentive	70,254	13,922	75	5,712	34,969	20,201	14,463	39.7%

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	2023	YTD July 2024P	YTD July 2023	% Change
First Time Visitors (%)	31.7	NA	14.2	21.4	26.0	28.5	26.0	2.5
Repeat Visitors (%)	68.3	NA	85.8	78.6	74.0	71.5	74.0	-2.5

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.

Tax Revenue

JAPAN MMA (by Air)	2019	2020	2021	2022	2023	YTD July 2024P	YTD July 2023	% Change
State tax revenue generated (\$ Millions) ^{2/}	262.43	NA	7.60	41.69	107.91	67.59	47.24	43.1%

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