



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 August 2024 Quick Facts^{1/}

Visitor Expenditures:	\$678.3 million
Primary Purpose of Stay:	Pleasure (393,482) vs. MCI (30,195)
Average Length of Stay:	6.24 days
First Time Visitors:	27.4%
Repeat Visitors:	72.6%

JAPAN MMA (by Air)	2019	2020	2021	2022	2023	2024 Annual Forecast*	YTD Aug. 2024P	YTD Aug. 2023	% Change
Visitor Expenditures (\$ Millions)	2,248.3	NA	65.1	359.4	930.3	1,070.5	678.3	530.7	27.8%
Visitor Days	9,306,767	1,719,843	294,720	1,526,608	3,864,472	4,424,958	2,852,350	2,237,219	27.5%
Arrivals	1,576,205	289,137	18,936	192,562	589,172	717,173	457,081	332,222	37.6%
Average Daily Census	25,498	4,699	807	4,182	10,588	12,090	11,690	9,207	27.0%
Per Person Per Day Spending (\$)	241.6	NA	220.9	235.4	240.7	241.9	237.8	237.2	0.3%
Per Person Per Trip Spending (\$)	1,426.4	NA	3,438.8	1,866.4	1,578.9	1,492.7	1,484.0	1,597.4	-7.1%
Length of Stay (days)	5.90	5.95	15.56	7.93	6.56	6.17	6.24	6.73	-7.3%

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 3, 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 eight months of 2024, there were 457,081 visitors from Japan, compared to 332,222 visitors (+37.6%) in the first eight months of 2023 and 1,029,549 visitors (-55.6%) in the first eight months of pre-pandemic 2019. Visitors from Japan spent \$678.3 million in the first eight months of 2024, compared to \$530.7 million (+27.8%) in the first eight months of 2023 and \$1.46 billion (-53.4%) in the first eight months of 2019. Daily visitor spending in the first eight months of 2024 (\$238 per person) grew slightly compared to the first eight months of 2023 (\$237 per person, +0.3%) and was equivalent to the first eight months of 2019 (\$238 per person, 0.0%).
- In the first eight months of 2024, 3,190 scheduled flights with 932,484 seats serviced Hawai'i from Japan. In the first eight months of 2023, there were 2,361 scheduled flights (+35.1%) with 645,805 seats (+44.4%). In the first eight months of 2019 there were 5,195 scheduled flights (-38.6%) with 1,326,446 seats (-29.7%).
- 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

- Japan's economy grew at an annualized rate of 3.1 percent in the second quarter (April-June) of 2024, rebounding from a contraction in the previous quarter. This growth was driven by increased consumption of automobiles and other durable goods. The GDP growth exceeded the average economist forecast of 2.3 percent, according to QUICK.
- The Japan National Tourism Organization estimates that 1,048,800 Japanese traveled abroad in July 2024, representing 61.2 percent of the figures from July 2019. This is a 2 percentage point increase compared to June 2024.
- Data from the Japan Tourism Agency reveals a recovery in overseas travel for June 2024. The total for independent travel (FIT) reached 99.9 billion yen, marking a 33.6 percent increase from June 2023, though it remains at 62.7 percent of June 2019 levels. Package tours saw significant growth, with handling amounting to 10.2 billion yen, an 89.2 percent increase from the previous year, and the number of travelers rising by 73.2 percent to 26,301.
- Research by Euromonitor reveals that Japan has the highest percentage of solo travelers, with 19.2 percent of Japanese respondents reporting that they often travel alone for vacations, either domestically or internationally. This contrasts with 7.2 percent globally. The proportion of solo travelers in Japan has nearly doubled over the past five years, from 10.4 percent in 2019.
- In July 2024, Hawai'i welcomed 102,907 direct flight passengers, with 66,557 identified as Japanese visitors, accounting for 64.7 percent of the total. The load factor for flights from Japan to Hawai'i was 87.5 percent, with 117,641 air seats in operation.
- On August 20, 2024, the ANA Group announced a reduction in flights on the Narita-Honolulu route starting January 2025. The service will decrease from 14 roundtrips per week (2 daily flights) to 10 roundtrips per week starting January 11, 2025. The reduction will affect the second daily flight, NH182/181, cutting it from 7 to 3 roundtrips per week. The first flight, NH184/183, will continue to operate 7 roundtrips per week.

Distribution by Island

JAPAN MMA (by Air)	2019	2020	2021	2022	2023	YTD Aug. 2024P	YTD Aug. 2023	% Change
O'ahu	1,492,753	269,402	18,001	186,609	573,719	446,767	321,847	38.8%
Maui County	48,524	8,265	775	5,710	11,927	9,386	7,323	28.2%
Maui	46,684	7,929	766	5,408	11,383	8,849	6,969	27.0%
Moloka'i	1,941	416	16	179	587	504	360	39.7%
Lāna'i	2,300	128	19	301	489	311	296	5.2%
Kaua'i	25,333	3,622	361	2,958	5,885	4,385	3,586	22.3%
Island of Hawai'i	170,686	35,453	1,000	15,510	44,758	32,383	27,493	17.8%

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	353,098	336,815	1,384,543	216,426	236,924	286,768	323,505	1,063,623	63.6	43.7	23.1	4.1	30.2
Fukuoka	10,842	10,842	11,676	10,842	44,202	0	7,506	11,120	10,564	29,190	NA	44.4	5.0	2.6	51.4
Nagoya	12,428	12,428	12,428	12,667	49,951	4,007	3,107	7,385	10,809	25,308	210.2	300.0	68.3	17.2	97.4
Osaka	40,833	40,833	41,350	41,350	164,366	28,512	31,785	35,130	39,626	135,053	43.2	28.5	17.7	4.4	21.7
Tokyo HND	139,628	129,186	133,062	130,702	532,578	88,113	95,079	104,972	130,590	418,754	58.5	35.9	26.8	0.1	27.2
Tokyo NRT	150,412	147,198	154,582	141,254	593,446	95,794	99,447	128,161	131,916	455,318	57.0	48.0	20.6	7.1	30.3

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	1,214	1,151	4,735	818	856	1,017	1,132	3,823	48.2	35.3	19.4	1.7	23.9
Fukuoka	39	39	42	39	159	0	27	40	38	105		44.4	5.0	2.6	51.4
Nagoya	52	52	52	53	209	20	13	36	47	116	160.0	300.0	44.4	12.8	80.2
Osaka	156	156	158	158	628	108	121	136	152	517	44.4	28.9	16.2	3.9	21.5
Tokyo HND	558	521	535	527	2,141	368	378	414	521	1,681	51.6	37.8	29.2	1.2	27.4
Tokyo NRT	407	390	427	374	1,598	322	317	391	374	1,404	26.4	23.0	9.2	0.0	13.8

Source: DBEDT analysis from Diio Mi flight schedules as of September 17, 2024, subject to change.

Group vs. True Independent; Leisure vs. Business

JAPAN MMA (by Air)	2019	2020	2021	2022	2023	YTD Aug. 2024P	YTD Aug. 2023	% Change
Group vs True Independent (Net)								
Group Tour	246,490	NA	204	12,941	73,690	60,088	38,343	56.7%
True Independent (Net)	594,917	NA	18,155	143,576	339,436	250,104	201,401	24.2%
Leisure vs Business								
Pleasure (Net)	1,360,644	247,980	13,254	158,823	505,037	393,482	289,304	36.0%
MCI (Net)	85,595	18,464	563	8,542	41,150	30,195	22,427	34.6%
Convention/Conf.	12,527	3,983	135	2,214	4,790	2,646	2,785	-5.0%
Corp. Meetings	4,068	951	368	981	1,911	872	1,112	-21.6%
Incentive	70,254	13,922	75	5,712	34,969	26,793	18,714	43.2%

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	2023	YTD Aug. 2024P	YTD Aug. 2023	% Change
First Time Visitors (%)	31.7	NA	14.2	21.4	26.0	27.4	24.3	3.1
Repeat Visitors (%)	68.3	NA	85.8	78.6	74.0	72.6	75.7	-3.1

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.

Tax Revenue

JAPAN MMA (by Air)	2019	2020	2021	2022	2023	YTD Aug. 2024P	YTD Aug. 2023	% Change
State tax revenue generated (\$ Millions) ^{2/}	262.43	NA	7.60	41.69	107.91	78.69	61.56	27.8%

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