



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 October 2024 Quick Facts^{1/}

Visitor Expenditures:	\$874.7 million
Primary Purpose of Stay:	Pleasure (502,860) vs. MCI (43,761)
Average Length of Stay:	6.22 days
First Time Visitors:	27.8%
Repeat Visitors:	72.2%

JAPAN MMA (by Air)	2019	2020	2021	2022	2023	2024 Annual Forecast*	YTD Oct. 2024P	YTD Oct. 2023	% Change
Visitor Expenditures (\$ Millions)	2,248.3	NA	65.1	359.4	930.3	1,070.5	874.7	719.6	21.5%
Visitor Days	9,306,767	1,719,843	294,720	1,526,608	3,864,472	4,424,958	3,662,935	3,019,462	21.3%
Arrivals	1,576,205	289,137	18,936	192,562	589,172	717,173	588,978	455,408	29.3%
Average Daily Census	25,498	4,699	807	4,182	10,588	12,090	12,010	9,932	20.9%
Per Person Per Day Spending (\$)	241.6	NA	220.9	235.4	240.7	241.9	238.8	238.3	0.2%
Per Person Per Trip Spending (\$)	1,426.4	NA	3,438.8	1,866.4	1,578.9	1,492.7	1,485.1	1,580.2	-6.0%
Length of Stay (days)	5.90	5.95	15.56	7.93	6.56	6.17	6.22	6.63	-6.2%

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).

Contact Information

Hawai'i Tourism Authority: Jadie Goo, Sr. Brand Manager
 Tel: (808) 973-2252
jadie@gohta.net

Hawai'i Tourism Japan: Eric Takahata, Managing Director
 Tel: (808) 942-4114
etakahata@htjapan.jp

^{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 10 months of 2024, there were 588,978 visitors from Japan, compared to 455,408 visitors (+29.3%) in the first 10 months of 2023 and 1,308,034 visitors (-55.0%) in the first 10 months of 2019. Visitors from Japan spent \$874.7 million in the first 10 months of 2024, compared to \$719.6 million (+21.5%) in the first 10 months of 2023 and \$1.85 billion (-52.7%) in the first 10 months of 2019. Daily visitor spending in the first 10 months of 2024 (\$239 per person) was slightly more than the first 10 months of 2023 (\$238 per person, +0.2%) and the first 10 months of 2019 (\$238 per person, +0.2%).
- In the first 10 months of 2024, 3,981 scheduled flights with 1,163,937 seats serviced Hawai'i from Japan. In the first 10 months of 2023, there were 3,041 scheduled flights (+30.9%) with 839,981 seats (+38.6%). In the first 10 months of 2019 there were 6,456 scheduled flights (-38.3%) with 1,664,725 seats (-30.1%).
- 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 Japanese yen weakened past 156 per dollar on November 15, 2024, marking a four-month low. Japan's economy grew by 0.2 percent quarter-over-quarter in Quarter 3 2024, a slowdown from the 0.5 percent growth in Quarter 2 2024. On an annualized basis, GDP grew 0.9 percent in Quarter 3, a sharp decline from 2.2 percent in Quarter 2.
- The estimated number of Japanese departures in September 2024 was 1,212,600, 69 percent of the 2019 number, maintaining the previous month's recovery level of about 70 percent of the pre-pandemic level.
- Expedia's ranking of popular Hawai'i destinations shows a strong preference for O'ahu among Japanese travelers, with increasing interest in accommodations featuring kitchens due to rising living costs.
- A survey by Hankyu Travel ahead of the year-end holidays identified France, Hawai'i, Australia, Italy, and the UK as top overseas destinations.
- JTB Research Institute surveyed travelers who have been abroad since 2023 to gather their views on travel costs and changes since the pandemic. The most common response (42.5%) was that while travel was expensive, it was expected. Even among the 37 percent who found costs "unexpectedly high," many said they would travel again despite the prices. To save money, travelers suggested bringing food from Japan, choosing budget-friendly destinations, and finding cheap restaurants ahead of time. However, some noted changes in travel planning, such as fewer direct flights, feeling satisfied with domestic travel, and fewer options offered by travel agencies.
- ANA, JAL, and HA have announced a reduction of fuel surcharge starting in December 2024, lowering the fee to a flat rate of 16,000 yen for one-way tickets with each airline. Additionally, both ANA and HA are currently running a limited-time sale on tickets for flights to Honolulu.
- JAL has expanded its in-flight Wi-Fi service effective October 1, 2024. On international flights, passengers in First and Business Class will now enjoy unlimited Wi-Fi access, while those in Premium Economy and Economy Class will receive free Wi-Fi for up to one hour. This service will be available on all JAL flights, except for codeshare flights. Video streaming and voice/video calls are not supported.

Distribution by Island

JAPAN MMA (by Air)	2019	2020	2021	2022	2023	YTD Oct. 2024P	YTD Oct. 2023	% Change
O'ahu	1,492,753	269,402	18,001	186,609	573,719	575,772	442,164	30.2%
Maui County	48,524	8,265	775	5,710	11,927	11,611	9,153	26.8%
Maui	46,684	7,929	766	5,408	11,383	10,961	8,735	25.5%
Moloka'i	1,941	416	16	179	587	635	554	14.6%
Lāna'i	2,300	128	19	301	489	377	347	8.5%
Kaua'i	25,333	3,622	361	2,958	5,885	5,342	4,843	10.3%
Island of Hawai'i	170,686	35,453	1,000	15,510	44,758	39,714	36,379	9.2%

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	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	NA	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 October 22, 2024, subject to change.

Group vs. True Independent; Leisure vs. Business

JAPAN MMA (by Air)	2019	2020	2021	2022	2023	YTD Oct. 2024P	YTD Oct. 2023	% Change
Group vs True Independent (Net)								
Group Tour	246,490	NA	204	12,941	73,690	80,427	53,249	51.0%
True Independent (Net)	594,917	NA	18,155	143,576	339,436	317,095	267,249	18.7%
Leisure vs Business								
Pleasure (Net)	1,360,644	247,980	13,254	158,823	505,037	502,860	396,796	26.7%
MCI (Net)	85,595	18,464	563	8,542	41,150	43,761	29,638	47.7%
Convention/Conf.	12,527	3,983	135	2,214	4,790	3,920	3,395	15.5%
Corp. Meetings	4,068	951	368	981	1,911	1,276	1,299	-1.7%
Incentive	70,254	13,922	75	5,712	34,969	38,722	25,130	54.1%

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.

First Timers vs. Repeat Visitors

JAPAN MMA (by Air)	2019	2020	2021	2022	2023	YTD Oct. 2024P	YTD Oct. 2023	% Change
First Time Visitors (%)	31.7	NA	14.2	21.4	26.0	27.8	25.7	2.0
Repeat Visitors (%)	68.3	NA	85.8	78.6	74.0	72.2	74.3	-2.0

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 Oct. 2024P	YTD Oct. 2023	% Change
State tax revenue generated (\$ Millions) ^{2/}	262.43	NA	7.60	41.69	107.91	101.46	83.48	21.5%

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