



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

Visitor Expenditures:	\$774.6 million
Primary Purpose of Stay:	Pleasure (448,126) vs. MCI (35,822)
Average Length of Stay:	6.23 days
First Time Visitors:	27.6%
Repeat Visitors:	72.4%

JAPAN MMA (by Air)	2019	2020	2021	2022	2023	2024 Annual Forecast*	YTD Sep. 2024P	YTD Sep. 2023	% Change
Visitor Expenditures (\$ Millions)	2,248.3	NA	65.1	359.4	930.3	1,070.5	774.6	632.0	22.6%
Visitor Days	9,306,767	1,719,843	294,720	1,526,608	3,864,472	4,424,958	3,253,593	2,654,633	22.6%
Arrivals	1,576,205	289,137	18,936	192,562	589,172	717,173	522,021	396,802	31.6%
Average Daily Census	25,498	4,699	807	4,182	10,588	12,090	11,874	9,724	22.1%
Per Person Per Day Spending (\$)	241.6	NA	220.9	235.4	240.7	241.9	238.1	238.1	0.0%
Per Person Per Trip Spending (\$)	1,426.4	NA	3,438.8	1,866.4	1,578.9	1,492.7	1,483.8	1,592.7	-6.8%
Length of Stay (days)	5.90	5.95	15.56	7.93	6.56	6.17	6.23	6.69	-6.8%

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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<sup>1/</sup> 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

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- In the first nine months of 2024, there were 522,021 visitors from Japan, compared to 396,802 visitors (+31.6%) in the first nine months of 2023 and 1,173,477 visitors (-55.5%) in the first nine months of pre-pandemic 2019. Visitors from Japan spent \$774.6 million in the first nine months of 2024, compared to \$632.0 million (+22.6%) in the first nine months of 2023 and \$1.65 billion (-53.1%) in the first nine months of 2019. Daily visitor spending in the first nine months of 2024 (\$238 per person) was equivalent to the first nine months of 2023 (\$238 per person, 0.0%) and slightly higher than the first nine months of 2019 (\$237 per person, +0.4%).
- In the first nine months of 2024, 3,584 scheduled flights with 1,047,728 seats serviced Hawai'i from Japan. In the first nine months of 2023, there were 2,691 scheduled flights (+33.2%) with 740,118 seats (+41.6%). In the first nine months of 2019 there were 5,836 scheduled flights (-38.6%) with 1,498,414 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

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- According to an estimate from the Japan Center for Economic Research, Japan's economy experienced an annualized growth of 0.4 percent in July 2024 compared to the previous month, primarily driven by an increase in exports.
- The projected number of Japanese travelers departing in August 2024 is over 1.4 million, marking the highest figure for the year and representing 68 percent of the levels seen in 2019.
- Recent data indicates that August 2024 saw 104,611 passengers to Hawai'i from Japan utilizing direct flights, with 63,964 identified as Japanese visitors, accounting for 61.1 percent of the total. The overall load factor for flights was recorded at 85.0 percent, with 123,043 available air seats.
- In an interview with Kyodo News, Hiroyuki Takahashi, Chairman of the Japan Association of Travel Agents and JTB, expressed his intention to request the government to provide free passports to all 18-year-olds. He noted that the recovery of international travel has been sluggish due to the weak yen and elevated travel costs post-COVID-19 pandemic. He emphasized the need for this initiative to encourage the younger generation to travel abroad, highlighting that only about 17 percent of Japanese people currently hold passports. He believes that offering a five-year passport to 18-year-olds could stimulate an increase in overseas travel.
- Expedia's ranking of the most popular international travel destinations for fall 2024 places Seoul at the top, followed by Taipei and other favored Asian locations in second place. Honolulu, a consistently popular destination, ranks third. The high ranking of Asian destinations, which are easily accessible during three-day weekends, is notable, alongside four non-Asian destinations, including Honolulu, likely influenced by the recent appreciation of the yen.
- On September 20, 2024, ZIPAIR announced the suspension of its winter schedule for NRT-HNL flights starting October 27th for the entire winter season. A ZIPAIR executive cited challenges with the ground handling operation as the reason for this decision. However, they have renewed their contract effective March 15, 2025, just weeks before the winter schedule concludes, and plan to resume operations on the NRT-HNL route.

- Hawaiian Airlines has begun offering complimentary Starlink high-speed inflight Wi-Fi on its Japan-Hawai'i routes. Earlier this year, Hawaiian became the first major U.S. airline to implement this service, initially installing it on Airbus A321neo aircraft, and has since equipped 24 Airbus A330 aircraft with the technology.

## Distribution by Island

JAPAN MMA (by Air)	2019	2020	2021	2022	2023	YTD Sep. 2024P	YTD Sep. 2023	% Change
O'ahu	1,492,753	269,402	18,001	186,609	573,719	510,025	384,612	32.6%
Maui County	48,524	8,265	775	5,710	11,927	10,448	8,313	25.7%
Maui	46,684	7,929	766	5,408	11,383	9,830	7,942	23.8%
Moloka'i	1,941	416	16	179	587	582	464	25.2%
Lāna'i	2,300	128	19	301	489	323	313	3.3%
Kaua'i	25,333	3,622	361	2,958	5,885	4,939	4,168	18.5%
Island of Hawai'i	170,686	35,453	1,000	15,510	44,758	36,451	32,714	11.4%

## 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>353,098</b>	<b>336,815</b>	<b>1,384,543</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>23.1</b>	<b>4.1</b>	<b>30.2</b>
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
<b>JAPAN</b>	<b>1,212</b>	<b>1,158</b>	<b>1,214</b>	<b>1,151</b>	<b>4,735</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>19.4</b>	<b>1.7</b>	<b>23.9</b>
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 Sep. 2024P	YTD Sep. 2023	% Change
Group vs True Independent (Net)								
Group Tour	246,490	NA	204	12,941	73,690	69,072	45,589	51.5%
True Independent (Net)	594,917	NA	18,155	143,576	339,436	284,605	237,840	19.7%
Leisure vs Business								
Pleasure (Net)	1,360,644	247,980	13,254	158,823	505,037	448,126	346,918	29.2%
MCI (Net)	85,595	18,464	563	8,542	41,150	35,822	25,356	41.3%
Convention/Conf.	12,527	3,983	135	2,214	4,790	2,941	2,945	-0.1%
Corp. Meetings	4,068	951	368	981	1,911	1,136	1,193	-4.8%
Incentive	70,254	13,922	75	5,712	34,969	31,889	21,402	49.0%

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.

## First Timers vs. Repeat Visitors

JAPAN MMA (by Air)	2019	2020	2021	2022	2023	YTD Sep. 2024P	YTD Sep. 2023	% Change
First Time Visitors (%)	31.7	NA	14.2	21.4	26.0	27.6	24.7	2.9
Repeat Visitors (%)	68.3	NA	85.8	78.6	74.0	72.4	75.3	-2.9

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 Sep. 2024P	YTD Sep. 2023	% Change
State tax revenue generated (\$ Millions) <sup>2/</sup>	262.43	NA	7.60	41.69	107.91	89.85	73.31	22.6%

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