



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 November 2024 Quick Facts^{1/}

Visitor Expenditures:	\$963.5 million
Primary Purpose of Stay:	Pleasure (549,300) vs. MCI (51,807)
Average Length of Stay:	6.18 days
First Time Visitors:	28.1%
Repeat Visitors:	71.9%

JAPAN MMA (by Air)	2019	2020	2021	2022	2023	2024 Annual Forecast*	YTD Nov. 2024P	YTD Nov. 2023	% Change
Visitor Expenditures (\$ Millions)	2,248.3	NA	65.1	359.4	930.3	1,122.2	963.5	816.0	18.1%
Visitor Days	9,306,767	1,719,843	294,720	1,526,608	3,864,472	4,638,781	4,015,540	3,403,205	18.0%
Arrivals	1,576,205	289,137	18,936	192,562	589,172	754,410	649,662	518,824	25.2%
Average Daily Census	25,498	4,699	807	4,182	10,588	12,674	11,987	10,189	17.6%
Per Person Per Day Spending (\$)	241.6	NA	220.9	235.4	240.7	241.9	239.9	239.8	0.1%
Per Person Per Trip Spending (\$)	1,426.4	NA	3,438.8	1,866.4	1,578.9	1,487.6	1,483.0	1,572.8	-5.7%
Length of Stay (days)	5.90	5.95	15.56	7.93	6.56	6.15	6.18	6.56	-5.8%

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 4, 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 11 months of 2024, there were 649,662 visitors from Japan, compared to 518,824 visitors (+25.2%) in the first 11 months of 2023 and 1,439,570 visitors (-54.9%) in the first 11 months of pre-pandemic 2019. Visitors from Japan spent \$963.5 million in the first 11 months of 2024, compared to \$816.0 million (+18.1%) in the first 11 months of 2023 and \$2.04 billion (-52.7%) in the first 11 months of 2019. Daily visitor spending in the first 11 months of 2024 (\$240 per person) was similar to the first 11 months of 2023 (\$240 per person, +0.1%) and the first 11 months of 2019 (\$240 per person, 0.0%).
- In the first 11 months of 2024, 4,351 scheduled flights with 1,272,266 seats serviced Hawai'i from Japan. In the first 11 months of 2023, there were 3,415 scheduled flights (+27.4%) with 945,249 seats (+34.6%). In the first 11 months of 2019 there were 7,052 scheduled flights (-38.3%) with 1,825,761 seats (-30.3%).
- 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 GDP grew at an annualized rate of 0.9 percent in the third quarter of 2024, marking positive growth for two consecutive quarters. This growth was primarily driven by strong consumer spending, indicating a rebound in domestic demand and a stable economic recovery.
- The estimated number of Japanese departures in October 2024 reached 1,148,400, which is 69 percent of the pre-pandemic level, maintaining a recovery rate of approximately 70 percent compared to the previous month.
- The October 2024 visitor numbers have just been released, showing 94,764 direct flight passengers, with 66,957 Japanese visitors to Hawai'i (70.7% share). The overall load factor for Japan routes was 81.4 percent, with 116,487 air seats operated.
- Tripadvisor's Winter 2024 Travel Trends report revealed that the percentage of Japanese travelers planning international trips between December 1, 2024, and February 28, 2025, increased by 21 percent compared to the previous year. 34 percent of Japanese travelers plan to visit new destinations, either within Japan or abroad. Additionally, 56 percent of Japanese prioritize airlines offering good value, while 52 percent prefer convenient flight schedules.
- Delta Air Lines is celebrating the first anniversary of its Haneda-Honolulu route with a special fare and award ticket discount campaign. The purchase deadline was November 29, 2024, with travel dates through February 28, 2025, subject to some exclusions.
- Japan Airlines launched its "JALunLun Black Friday 2024" campaign on November 22, 2024. The campaign includes sales on domestic and international flights, travel packages, promotions at JAL MALL, and in-flight sales on domestic routes. The overseas ticket sale ran through November 29, 2024, targeting routes such as Honolulu, with round-trip fares starting at 87,000 yen (14,000 miles). The JAL Dynamic Package sale, which bundles airfare and hotel, ran until December 3, 2024, offering discounts of up to 40,000 yen per person for international destinations.

- All Nippon Airways (ANA) launched its time sale for international flights. The Hawai'i route will be available from December 1 through April 23, 2025, with round-trip fares starting at 87,000 yen in economy. ANA also held a Black Friday sale with the "ANA SUPER VALUE SALE" on November 29 for flights between December 27 and January 5, 2025.

Distribution by Island

JAPAN MMA (by Air)	2019	2020	2021	2022	2023	YTD Nov. 2024P	YTD Nov. 2023	% Change
O'ahu	1,492,753	269,402	18,001	186,609	573,719	635,122	503,990	26.0%
Maui County	48,524	8,265	775	5,710	11,927	12,769	10,338	23.5%
Maui	46,684	7,929	766	5,408	11,383	12,097	9,863	22.6%
Moloka'i	1,941	416	16	179	587	664	587	13.2%
Lāna'i	2,300	128	19	301	489	391	421	-6.9%
Kaua'i	25,333	3,622	361	2,958	5,885	5,943	5,539	7.3%
Island of Hawai'i	170,686	35,453	1,000	15,510	44,758	42,526	40,470	5.1%

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 Nov. 2024P	YTD Nov. 2023	% Change
Group vs True Independent (Net)								
Group Tour	246,490	NA	204	12,941	73,690	93,232	64,007	45.7%
True Independent (Net)	594,917	NA	18,155	143,576	339,436	347,428	299,836	15.9%
Leisure vs Business								
Pleasure (Net)	1,360,644	247,980	13,254	158,823	505,037	549,300	449,698	22.1%
MCI (Net)	85,595	18,464	563	8,542	41,150	51,807	36,133	43.4%
Convention/Conf.	12,527	3,983	135	2,214	4,790	4,595	4,090	12.4%
Corp. Meetings	4,068	951	368	981	1,911	1,350	1,699	-20.5%
Incentive	70,254	13,922	75	5,712	34,969	46,040	30,750	49.7%

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 Nov. 2024P	YTD Nov. 2023	% Change
First Time Visitors (%)	31.7	NA	14.2	21.4	26.0	28.1	26.1	2.0
Repeat Visitors (%)	68.3	NA	85.8	78.6	74.0	71.9	73.9	-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 Nov. 2024P	YTD Nov. 2023	% Change
State tax revenue generated (\$ Millions) ^{2/}	262.43	NA	7.60	41.69	107.91	111.76	94.66	18.1%

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