



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

Visitor Expenditures:	\$1.07 billion
Primary Purpose of Stay:	Pleasure (604,054) vs. MCI (53,423)
Average Length of Stay:	6.18 days
First Time Visitors:	27.8%
Repeat Visitors:	72.2%

JAPAN MMA (by Air)	2019	2020	2021	2022	2023	2024 Annual Forecast*	YTD Dec. 2024P	YTD Dec. 2023	% Change
Visitor Expenditures (\$ Millions)	2,248.3	NA	65.1	359.4	930.3	1,122.2	1,067.8	930.3	14.8%
Visitor Days	9,306,767	1,719,843	294,720	1,526,608	3,864,472	4,638,781	4,454,166	3,864,472	15.3%
Arrivals	1,576,205	289,137	18,936	192,562	589,172	754,410	720,488	589,172	22.3%
Average Daily Census	25,498	4,699	807	4,182	10,588	12,674	12,170	10,588	14.9%
Per Person Per Day Spending (\$)	241.6	NA	220.9	235.4	240.7	241.9	239.7	240.7	-0.4%
Per Person Per Trip Spending (\$)	1,426.4	NA	3,438.8	1,866.4	1,578.9	1,487.6	1,482.1	1,578.9	-6.1%
Length of Stay (days)	5.90	5.95	15.56	7.93	6.56	6.15	6.18	6.56	-5.7%

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).

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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 calendar year 2024, there were 720,488 visitors from Japan, compared to 589,172 visitors (+22.3%) in 2023. Japanese arrivals in 2024 represent a 45.7 percent recovery rate from pre-pandemic 2019 (1,576,205 visitors, -54.3%). Visitors from Japan spent \$1.07 billion in 2024, compared to \$930.3 million (+14.8%) in 2023 and \$2.25 billion (-52.5%) in 2019. Daily visitor spending in 2024 (\$240 per person) went down slightly from 2023 (\$241 per person, -0.4%) and 2019 (\$242 per person, -0.8%).
- In 2024, 4,734 scheduled flights with 1,384,265 seats serviced Hawai'i from Japan. In 2023, there were 3,823 scheduled flights (+23.8%) with 1,063,623 seats (+30.1%). In 2019, there were 7,696 scheduled flights (-38.5%) with 1,999,204 seats (-30.8%).
- 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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- The Daiwa Institute of Research projects Japan's real GDP growth for 2025 to be +1.6 percent. Growth in personal income is expected to boost consumption, with the service sector, particularly tourism, playing a key role in economic expansion. Government measures worth approximately 7 trillion yen are also expected to support consumption, while inbound tourism is anticipated to continue growing, further contributing to economic growth.
- In November 2024, approximately 1,175,100 Japanese travelers departed Japan, reaching 71 percent of the departures recorded in November 2019 (1,642,333) and a 14.4 percent rise compared to November 2023 (1,027,110 departures), according to the Japan National Tourism Organization (JNTO).
- HIS has launched a new travel service called "AirZ," which allows users to easily combine international airline tickets and hotel accommodations. Using dynamic packages and arranged tours, AirZ offers flexibility with tickets from over 400 airlines and 70,000 hotels worldwide. Travelers can confirm reservations instantly and customize their bookings, including options for transfers, activities, and insurance. The service also provides 24-hour Japanese-language support for any issues during the trip.
- ANA's international flight bookings saw a significant year-on-year increase. Among the various destinations, Hawai'i stood out as a standout performer. During the New Year holiday period, the airline recorded 23,553 bookings to Hawai'i, marking the highest number ever achieved for this time frame.
- JAL has announced a fuel surcharge increase for tickets issued between February and March 2025. For flights to Hawai'i, the surcharge will rise to ¥18,500 per one-way trip, an increase of ¥2,500 from the current rate. Other airlines are also expected to implement similar surcharge hikes soon.
- Alaska Air Group (Hawaiian Airlines) announced new nonstop flights between Seattle and Tokyo and South Korea. The HNL-NRT route will be replaced by a new NRT-Seattle route with A330 aircraft. To offset this change, Hawaiian Airlines will increase its service between HNL and HND from 12 to 14 weekly flights, make the HNL-KIX route daily, and maintain three weekly flights to FUK, offering a total of 24 weekly flights between Honolulu and Japan..

## Distribution by Island

JAPAN MMA (by Air)	2019	2020	2021	2022	2023	YTD Dec. 2024P	YTD Dec. 2023	% Change
O'ahu	1,492,753	269,402	18,001	186,609	573,719	705,163	573,719	22.9%
Maui County	48,524	8,265	775	5,710	11,927	14,382	11,927	20.6%
Maui	46,684	7,929	766	5,408	11,383	13,711	11,383	20.5%
Moloka'i	1,941	416	16	179	587	695	587	18.3%
Lāna'i	2,300	128	19	301	489	403	489	-17.7%
Kaua'i	25,333	3,622	361	2,958	5,885	7,057	5,885	19.9%
Island of Hawai'i	170,686	35,453	1,000	15,510	44,758	46,677	44,758	4.3%

## 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>336,537</b>	<b>1,384,265</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>4.0</b>	<b>30.1</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	140,976	593,168	95,794	99,447	128,161	131,916	455,318	57.0	48.0	20.6	6.9	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>1,150</b>	<b>4,734</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>1.6</b>	<b>23.8</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	373	1,597	322	317	391	374	1,404	26.4	23.0	9.2	-0.3	13.7

Source: DBEDT analysis from Diio Mi flight schedules as of January 15, 2025, subject to change.

## Group vs. True Independent; Leisure vs. Business

JAPAN MMA (by Air)	2019	2020	2021	2022	2023	YTD Dec. 2024P	YTD Dec. 2023	% Change
Group vs True Independent (Net)								
Group Tour	246,490	NA	204	12,941	73,690	98,923	73,690	34.2%
True Independent (Net)	594,917	NA	18,155	143,576	339,436	389,758	339,436	14.8%
Leisure vs Business								
Pleasure (Net)	1,360,644	247,980	13,254	158,823	505,037	604,054	505,037	19.6%
MCI (Net)	85,595	18,464	563	8,542	41,150	53,423	41,150	29.8%
Convention/Conf.	12,527	3,983	135	2,214	4,790	4,761	4,790	-0.6%
Corp. Meetings	4,068	951	368	981	1,911	1,396	1,911	-26.9%
Incentive	70,254	13,922	75	5,712	34,969	47,445	34,969	35.7%

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 Dec. 2024P	YTD Dec. 2023	% Change
First Time Visitors (%)	31.7	NA	14.2	21.4	26.0	27.8	26.0	1.8
Repeat Visitors (%)	68.3	NA	85.8	78.6	74.0	72.2	74.0	-1.8

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 Dec. 2024P	YTD Dec. 2023	% Change
State tax revenue generated (\$ Millions) <sup>2/</sup>	262.43	NA	7.60	41.69	107.91	123.87	107.91	14.8%

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