



Japan Fact Sheet

Japan Overview

The Hawai'i Tourism Authority selected a.link LLC for Brand Marketing and Management Services in Japan. Japan has long been Hawai'i's largest source of international visitors. While the coronavirus pandemic significantly reduced the number of Japanese visitor arrivals, Hawai'i Tourism Japan (HTJ) continues to leverage the regions' longstanding ties to advance tourism recovery efforts in 2022. HTJ's regenerative tourism framework aims to inspire the values of *aloha* and *mālama* with travelers and industry partners while developing consumer, public relations, and travel trade programs to educate and connect visitors with the local community.

Year-to-date November 2022 Quick Facts^{1/}

Visitor Expenditures: \$313.5 million
 Primary Purpose of Stay: Pleasure (136,027) vs. MCI (6,799)
 Average Length of Stay: 8.29 days
 First Time Visitors: 21.2%
 Repeat Visitors: 78.8%

JAPAN MMA (by Air)	2019	2020	2021	2022 Annual Forecast*	YTD Nov. 2022P	YTD Nov. 2021	% Change YTD
Visitor Expenditures (\$ Millions)	2,248.3	NA	65.1	468.1	313.5	57.0	449.7%
Visitor Days	9,306,767	1,719,843	294,720	2,024,134	1,349,393	259,514	420.0%
Arrivals	1,576,205	289,137	18,936	209,890	162,772	16,518	885.4%
Average Daily Census	25,498	4,699	807	5,546	4,040	777	420.0%
Per Person Per Day Spending (\$)	241.6	NA	220.9	231.2	232.3	219.8	5.7%
Per Person Per Trip Spending (\$)	1,426.4	NA	3,438.8	2,230.0	1,926.1	3,452.6	-44.2%
Length of Stay (days)	5.90	5.95	15.56	9.64	8.29	15.71	-47.2%

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) 2022 annual forecast (Quarter 3, 2022).

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^{1/} 2022 visitor data are preliminary. 2021, 2020 and 2019 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

Prior to the global COVID-19 pandemic, Hawai'i achieved record-level visitor expenditures and arrivals in 2019 through February 2020. On March 26, 2020, the state implemented mandatory quarantine and travel restrictions. Subsequently, nearly all trans-Pacific and interisland flights were canceled, cruise ship activities were suspended and tourism to the islands all but shut down. In October 2020, the state initiated the Safe Travels program, which allowed travelers to bypass quarantine if they had a valid negative COVID test. Through March 25, 2022, domestic passengers could bypass the state's mandatory self-quarantine if they were vaccinated or have a negative COVID pre-travel test. The Safe Travels program ended on March 26, 2022. In November 2022, there were no travel restrictions for passengers arriving to Hawai'i on domestic direct flights from the U.S. Mainland, or for passengers arriving on direct international flights.

- Through the first 11 months of 2022 there were 162,772 visitors from Japan compared to 1,439,570 visitors (-88.7%) in the first 11 months of 2019.
- Visitors from Japan spent \$313.5 million in the first 11 months of 2022 compared to \$2.04 billion (-84.6%) in the first 11 months of 2019.
- There were 1,632 scheduled flights with 400,133 seats in the first 11 months of 2022 compared to 7,052 flights (-76.9%) with 1,825,761 seats (-78.1%) in the first 11 months of 2019.
- For all of 2021, 18,936 visitors arrived from Japan. In comparison, there were 289,137 visitors (-93.5%) from Japan in 2020, and 1,576,205 visitors (-98.8%) in 2019.
- Total visitor spending in 2021 was \$65.1 million, a 97.1 percent drop from \$2.25 billion in 2019. Comparative 2020 visitor spending data was not available.
- In 2021, there were 529 scheduled flights with 131,766 seats from Japan. In comparison, there were 1,787 flights with 483,574 seats in 2020, and 7,696 flights with 1,999,204 seats in 2019.

Market Conditions

- According to the household budget survey, the consumption expenditure of households with two or more people in September 2022 increased by 2.3 percent year-on-year to 280,999 yen. Service consumption such as travel is growing rapidly.
- In November 2022, the yen exchange rate has been in the high 130-yen range, slightly down from previous months.
- The consumer price increase in October 2022 was 3.6 percent for the first time in 40 years and 8 months. Consumption is expected to slow down due to rising prices.
- Nationwide travel assistance is boosting consumption and number of domestic visitors to Okinawa surpassed pre-COVID level. The recovery in overseas travel is expected to be slow due to increased demand for domestic travel.
- According to preliminary figures by Japan National Tourism Organization, the number of Japanese overseas travelers in October 2022 was 349,600, down 79 percent compared to October 2021. However, it has surpassed 300,000 for the third consecutive month.
- With fuel surcharges rising, ANA will conduct 3-day campaign to commemorate its 70th anniversary from November 29 to December 1, 2022. Tickets will be sold for 95,000 yen round

trip to Honolulu including fuel surcharge for travelers between November 29, 2022 and February 28, 2023.

- Hawaiian Airlines plans to return their Fukuoka-Honolulu route. The first flights from Japan were scheduled to be February however it is currently being adjusted.
- Japan Airlines is making efforts to make all flights sustainable. As the first initiative, they flew a “sustainable charter flight” on Tokyo-Okinawa route. They will aim to reduce CO2 emissions, eliminate plastics, reduce loss, promote D&I, and revitalize local communities while working with consumers and the community.

Distribution by Island

JAPAN MMA (by Air)	2019	2020	2021	YTD Nov. 2022P	YTD Nov. 2021	% Change YTD
O'ahu	1,492,753	269,402	18,001	157,856	15,733	903.3%
Maui County	48,524	8,265	775	4,752	617	669.7%
Maui	46,684	7,929	766	4,519	611	639.5%
Moloka'i	1,941	416	16	122	16	684.9%
Lāna'i	2,300	128	19	294	16	1708.9%
Kaua'i	25,333	3,622	361	2,540	263	865.0%
Island of Hawai'i	170,686	35,453	1,000	13,133	692	1796.9%

Airlift: Scheduled Seats and Flights

Scheduled seats	2022					2021					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
JAPAN	51,243	64,306	161,113	204,430	481,092	30,717	24,354	32,490	44,205	131,766	66.8	164.0	395.9	362.5	265.1
Nagoya	0	0	2587	3344	5,931	0	0	0	186	186	NA	NA	NA	1697.8	3088.7
Osaka	3,809	3,614	21,336	27,861	56,620	5,004	3,614	3,892	3,614	16,124	-23.9	0.0	448.2	670.9	251.2
Sapporo	14,946	20,530	66,995	86,520	188,991	12,500	9,620	11,520	12,876	46,516	19.6	113.4	481.6	571.9	306.3
Tokyo HND	32,488	40,162	70,195	86,705	229,550	13,213	11,120	17,078	27,529	68,940	145.9	261.2	311.0	215.0	233.0
Tokyo NRT	51,243	64,306	161,113	204,430	481,092	30,717	24,354	32,490	44,205	131,766	66.8	164.0	395.9	362.5	265.1

Source: DBEDT analysis based on scheduled seats from Diiro Mi flight schedules as of December 22, 2022, subject to change.

Scheduled flights	2022					2021					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
JAPAN	236	277	642	780	1,935	118	102	128	181	529	100.0	171.6	401.6	330.9	265.8
Nagoya	0	0	13	17	30	0	0	0	1	1	NA	NA	NA	1600.0	2900.0
Osaka	14	13	83	105	215	18	13	14	13	58	-22.2	0.0	492.9	707.7	270.7
Sapporo	70	98	285	364	817	53	49	55	63	220	32.1	100.0	418.2	477.8	271.4
Tokyo HND	152	166	261	294	873	47	40	59	104	250	223.4	315.0	342.4	182.7	249.2
Tokyo NRT	236	277	642	780	1,935	118	102	128	181	529	100.0	171.6	401.6	330.9	265.8

Source: DBEDT analysis based on scheduled flights from Diiro Mi flight schedules as of December 22, 2022, subject to change.

Group vs. True Independent; Leisure vs. Business

JAPAN MMA (by Air)	2019	2020	2021	YTD Nov. 2022P	YTD Nov. 2021	% Change YTD
Group vs True Independent (Net)						
Group Tour	246,490	NA	203.8	10,492	185	5559.7%
True Independent (Net)	594,917	NA	18,155.3	124,203	15,896	681.3%
Leisure vs Business						
Pleasure (Net)	1,360,644	247,980	13,254	136,027	11,685	1064.1%
MCI (Net)	85,595	18,464	563	6,799	507	1241.6%
Convention/Conf.	12,527	3,983	135	1,902	97	1862.7%
Corp. Meetings	4,068	951	368	876	344	154.7%
Incentive	70,254	13,922	75	4,299	75	5620.5%

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	YTD Nov. 2022P	YTD Nov. 2021	% Change YTD
First Time Visitors (%)	31.7	NA	14.2	21.2	13.9	7.3
Repeat Visitors (%)	68.3	NA	85.8	78.8	86.1	-7.3

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	YTD Nov. 2022P	YTD Nov. 2021	% Change YTD
State tax revenue generated (\$ Millions) ^{2/}	262.43	NA	7.60	36.37	6.66	446.3%

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