



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 December 2022 Quick Facts^{1/}

Visitor Expenditures: \$376.3 million
 Primary Purpose of Stay: Pleasure (163,582) vs. MCI (9,114)
 Average Length of Stay: 8.07 days
 First Time Visitors: 21.4%
 Repeat Visitors: 78.6%

JAPAN MMA (by Air)	2019	2020	2021	2022 Annual Forecast*	YTD Dec. 2022P	YTD Dec. 2021	% Change YTD
Visitor Expenditures (\$ Millions)	2,248.3	NA	65.1	468.1	376.3	65.1	477.9%
Visitor Days	9,306,767	1,719,843	294,720	2,024,134	1,611,798	294,720	446.9%
Arrivals	1,576,205	289,137	18,936	209,890	199,760	18,936	954.9%
Average Daily Census	25,498	4,699	807	5,546	4,416	807	446.9%
Per Person Per Day Spending (\$)	241.6	NA	220.9	231.2	233.5	220.9	5.7%
Per Person Per Trip Spending (\$)	1,426.4	NA	3,438.8	2,230.0	1,883.7	3,438.7	-45.2%
Length of Stay (days)	5.90	5.95	15.56	9.64	8.07	15.56	-48.2%

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 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 had a negative COVID pre-travel test. The Safe Travels Program ended on March 25, 2022, and domestic pre-travel requirements ceased as of March 26, 2022. Passengers arriving on direct international flights through June 11, 2022 were subjected to federal U.S. entry requirements which included proof of an up-to-date vaccination document and negative COVID-19 test result taken within one day of travel. This requirement was lifted on June 12, 2022.

- For all of 2022, there were 199,760 visitors from Japan compared to 1,576,205 visitors (-87.3%) in 2019.
- Visitors from Japan spent \$376.3 million in 2022 compared to \$2.25 billion (-83.3%) in 2019. Daily visitor spending in 2022 decreased to \$233 per person from \$242 per person (-3.4%) in 2019.
- In 2022, there were 1,928 scheduled flights and 479,146 seats from Japan compared to 7,696 flights (-74.9%) and 1,999,204 seats (-76.0%) in 2019.
- In 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

- Japan's November 2022 consumer price index was 3.7 percent higher compared to 2021. Japan's per capita nominal GDP is \$39,803, ranking 20th among 38 member countries of the Organization for Economic Co-operation and Development (OECD). The real GDP growth rates for FY2022 and FY2023 are projected to be 1.7 percent and 0.8 percent, respectively.
- The consumer price index in November 2022 rose 3.7 percent, the highest level in 40 years and 11 months due to impact of yen depreciation and high resource prices. On the other hand, the average amount of winter bonuses paid by major companies increased by 8.9 percent from the previous year, the first increase in three years, indicating that the economy is recovering.
- According to the October 2022 household budget survey, households with two or more people spent 298,006 yen, up 1.2 percent from October 2021. Consumption of travel-related services increased, with lodging fee by 59.2 percent and domestic package tour costs by 58.7 percent. Nationwide travel support program will continue in 2023. The effect of boosting consumption is expected to reach 246 billion yen by the end of March 2023.

- The number of travelers during the year-end and New Year holidays was about 70 percent of the 2019 level, and the number of overseas travelers is estimated about 18 percent. Overseas travel expenses per person increased by 29 percent from 2019 to 260,000 yen due to the increase in the number of stays. The number of international flight users at Narita Airport also recovered to 44.6 percent of 2019 level.
- According to the Japan National Tourism Organization, an estimated 379,200 Japanese people departed Japan in November 2022, up 30,000 from the previous month and down 79.6 percent from November 2019. The number of international flights and number of seats for Japan departed flights has tripled compared to the previous year.
- The 50th Honolulu Marathon, sponsored by Japan Airlines was held on December 11, 2022. A total of 28,411 people participated, of which 5,469 were Japanese participants, a significant increase from 181 Japanese participants in 2021.
- Air service: All Nippon Airways (ANA): Currently operating FLYING HONU A380 5 times a week from Narita. Haneda-Honolulu flights are operating daily 7 times.

Hawaiian Airlines (HA): Currently operating daily 7 times for all Hawai'i bound from Haneda, Narita, and Kansai (KIX).

Japan Airlines (JAL): Flight from Narita and Haneda has been operating 7 times daily. KIX – Honolulu and Centrair-Honolulu is operating 2 times a week.

ZIPAIR: Currently operating 3 flights a week from Narita. For 2023 spring vacation period (3/15 to 3/24), ZIPAIR will increase to daily flights.

Distribution by Island

JAPAN MMA (by Air)	2019	2020	2021	YTD Dec. 2022P	YTD Dec. 2021	% Change YTD
O'ahu	1,492,753	269,402	18,001	193,555	18,001	975.3%
Maui County	48,524	8,265	775	6,019	775	676.2%
Maui	46,684	7,929	766	5,679	766	641.4%
Moloka'i	1,941	416	16	189	16	1117.1%
Lāna'i	2,300	128	19	335	19	1631.3%
Kaua'i	25,333	3,622	361	2,956	361	718.7%
Island of Hawai'i	170,686	35,453	1,000	16,163	1,000	1516.9%

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	159,082	311,741	586,372	30,717	24,354	32,490	44,205	131,766	66.8	164.0	395.9	362.5	265.1
Nagoya			2587	9001	11,588			0	186	186				1697.8	3088.7
Osaka	3,809	3,614	21,614	43,644	72,681	5,004	3,614	3,892	3,614	16,124	-23.9	0.0	448.2	670.9	251.2
Tokyo HND	14,946	20,530	67,273	120,653	223,402	12,500	9,620	11,520	12,876	46,516	19.6	113.4	481.6	571.9	306.3
Tokyo NRT	32,488	40,162	67,608	120,929	261,187	13,213	11,120	17,078	27,529	68,940	145.9	261.2	311.0	215.0	233.0

Source: DBEDT analysis based on scheduled seats from Diio 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			13	17	30			0	1	1				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
Tokyo HND	70	98	285	364	817	53	49	55	63	220	32.1	100.0	418.2	477.8	271.4
Tokyo NRT	152	166	261	294	873	47	40	59	104	250	223.4	315.0	342.4	182.7	249.2

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 Dec. 2022P	YTD Dec. 2021	% Change YTD
Group vs True Independent (Net)						
Group Tour	246,490	NA	203.8	13,664	204	6605.0%
True Independent (Net)	594,917	NA	18,155.3	148,880	18,155	720.0%
Leisure vs Business						
Pleasure (Net)	1,360,644	247,980	13,254	163,582	13,254	1134.2%
MCI (Net)	85,595	18,464	563	9,114	563	1518.9%
Convention/Conf.	12,527	3,983	135	2,309	135	1612.7%
Corp. Meetings	4,068	951	368	1,048	368	185.1%
Incentive	70,254	13,922	75	6,168	75	8108.4%

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 Dec. 2022P	YTD Dec. 2021	% Change YTD
First Time Visitors (%)	31.7	NA	14.2	21.4	14.2	7.1
Repeat Visitors (%)	68.3	NA	85.8	78.6	85.8	-7.1

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.

Tax Revenue

JAPAN MMA (by Air)	2019	2020	2021	YTD Dec. 2022P	YTD Dec. 2021	% Change YTD
State tax revenue generated (\$ Millions) ^{2/}	262.43	NA	7.60	43.65	7.60	474.3%

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