



Japan Fact Sheet

Japan Overview

The Hawai'i Tourism Authority selected a.link LLC for Brand Marketing and Management Services in Japan. In 2023, HTJ continues to target and educate pono travelers to Mālama Hawai'i, promote Hawai'i's unique brand story on Hawaiian culture, local community and natural beauty, and leverage its extensive network to create initiatives that pivot towards regenerative tourism.

January 2023 Quick Facts^{1/}

Visitor Expenditures: \$58.1 million
 Primary Purpose of Stay: Pleasure (29,006) vs. MCI (1,416)
 Average Length of Stay: 7.59 days
 First Time Visitors: 17.6%
 Repeat Visitors: 82.4%

JAPAN MMA (by Air)	2019	2020	2021	2022P	2022 Annual Forecast*	Jan. 2023P	Jan. 2022P	% Change
Visitor Expenditures (\$ Millions)	2,248.3	NA	65.1	376.3	468.1	58.1	11.6	401.1%
Visitor Days	9,306,767	1,719,843	294,720	1,611,798	2,024,134	245,127	53,641	357.0%
Arrivals	1,576,205	289,137	18,936	199,760	209,890	32,305	2,850	1033.6%
Average Daily Census	25,498	4,699	807	4,416	5,546	7,907	1,730	357.0%
Per Person Per Day Spending (\$)	241.6	NA	220.9	233.5	231.2	237.1	216.3	9.7%
Per Person Per Trip Spending (\$)	1,426.4	NA	3,438.8	1,883.7	2,230.0	1,799.4	4,070.5	-55.8%
Length of Stay (days)	5.90	5.95	15.56	8.07	9.64	7.59	18.82	-59.7%

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) 2022 annual forecast (Quarter 3, 2022).

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^{1/} 2023 and 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

- There were 32,305 visitors from Japan in January 2023, compared to 2,850 visitors (+1,033.6%) in January 2022, and 120,418 visitors (-73.2%) in January 2019, prior to the COVID-19 global pandemic. Visitors from Japan spent \$58.1 million in January 2023, compared to \$11.6 million (+401.1%) in January 2022 and \$173.4 million (-66.5%) in January 2019. Daily spending by Japanese visitors in January 2023 (\$237 per person) increased compared to January 2022 (\$216 per person, +9.7%), but was slightly lower than January 2019 (\$240 per person, -1.0%).
- In January 2023, there were 287 scheduled flights with 76,511 seats from Japan. Air capacity was much greater compared to January 2022 (78 flights, +267.9%, with 16,033 seats, +377.2%) but remained below January 2019 (696 flights, -58.8%, and 174,100 seats, -56.1%).
- In 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 GDP growth is projected to be 1.5 percent in FY2022 and 0.8 percent in FY2023. Personal consumption on a GDP basis is expected to increase by 2.5 percent year-on-year in FY2022 and 1.1 percent year-on-year in FY2023, showing moderate growth centered on travel and services. Movements are picking up from within Japan, such as net spending on travel recovering to pre-COVID levels.
- In mid-January 2023, the yen exchange rate rose to the 127-yen level for the first time in about seven months and has since remained at the low 130 yen level. Interest rates are expected to rise following the change of the governor of the Bank of Japan in April 2023, and expectations are rising that the yen will appreciate in the future.
- In 2022, 2,771,700 Japanese visited abroad (recovery of 13.8% compared to 2019). In December, 432,100 people traveled abroad during the year-end and New Year holidays, the highest number for the year. The annual number of passengers at Narita Airport increased by 2.9 times, 10 million more than 2021.
- The Japanese government will downgrade the legal classification of COVID-19 from the current Class II to Class V under the Infectious Diseases Control Law, same class as seasonal flu, effective May 8, 2023.
- 80.3 percent of Japan's population are fully vaccinated and 68.3 percent are vaccinated at least three times.

- From April 30, 2023, Hawaiian Airlines will Fukuoka-Honolulu route, with three weekly flights.
- From April 20, 2023, ANA will increase to daily service with the 520-seat Flying Honu A380 resume.
- Currently, one-way surcharge for Japan-Hawai'i is between 30,500 – 31,000 yen.

Distribution by Island

JAPAN MMA (by Air)	2019	2020	2021	2022P	Jan. 2023P	Jan. 2022P	% Change
O'ahu	1,492,753	269,402	18,001	193,555	31,703	2,679	1083.5%
Mau'i County	48,524	8,265	775	6,019	977	245	299.3%
Mau'i	46,684	7,929	766	5,679	911	245	272.0%
Moloka'i	1,941	416	16	189	46	0	#DIV/0!
Lāna'i	2,300	128	19	335	32	0	#DIV/0!
Kaua'i	25,333	3,622	361	2,956	520	59	785.0%
Island of Hawai'i	170,686	35,453	1,000	16,163	2,347	296	692.2%

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 Diio 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	2022P	Jan. 2023P	Jan. 2022P	% Change
Group vs True Independent (Net)							
Group Tour	246,490	NA	203.8	13,664	1,688	25	6684.9%
True Independent (Net)	594,917	NA	18,155.3	148,880	23,656	2,802	744.1%
Leisure vs Business							
Pleasure (Net)	1,360,644	247,980	13,254	163,582	29,006	1,759	1548.8%
MCI (Net)	85,595	18,464	563	9,114	1,416	47	2940.6%
Convention/Conf.	12,527	3,983	135	2,309	366	3	11326.1%
Corp. Meetings	4,068	951	368	1,048	103	15	603.6%
Incentive	70,254	13,922	75	6,168	986	29	3332.9%

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.

First Timers vs. Repeat Visitors

JAPAN MMA (by Air)	2019	2020	2021	2022P	Jan. 2023P	Jan. 2022P	% Change
First Time Visitors (%)	31.7	NA	14.2	21.4	17.6	8.3	9.3
Repeat Visitors (%)	68.3	NA	85.8	78.6	82.4	91.7	-9.3

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	2022P	Jan. 2023P	Jan. 2022P	% Change
State tax revenue generated (\$ Millions) ^{2/}	262.43	NA	7.60	43.65	6.74	1.35	398.0%

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