



# 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.

## Year-to-date March 2023 Quick Facts<sup>1/</sup>

Visitor Expenditures: \$163.2 million  
 Primary Purpose of Stay: Pleasure (87,422) vs. MCI (5,219)  
 Average Length of Stay: 7.01 days  
 First Time Visitors: 22.8%  
 Repeat Visitors: 77.2%

JAPAN MMA (by Air)	2019	2020	2021	2022P	2023 Annual Forecast*	YTD Mar. 2023P	YTD Mar. 2022P	% Change
Visitor Expenditures (\$ Millions)	2,248.3	NA	65.1	376.3	1,768.9	163.2	31.5	418.2%
Visitor Days	9,306,767	1,719,843	294,720	1,611,798	7,216,077	694,241	146,352	374.4%
Arrivals	1,576,205	289,137	18,936	199,760	962,144	98,994	9,068	991.6%
Average Daily Census	25,498	4,699	807	4,416	19,770	7,714	1,626	374.4%
Per Person Per Day Spending (\$)	241.6	NA	220.9	233.5	245.1	235.1	215.2	9.2%
Per Person Per Trip Spending (\$)	1,426.4	NA	3,438.8	1,883.7	1,838.5	1,648.4	3,472.4	-52.5%
Length of Stay (days)	5.90	5.95	15.56	8.07	7.50	7.01	16.14	-56.5%

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) 2023 annual forecast (Quarter 1, 2023).

## Contact Information

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<sup>1/</sup> 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

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- In the first quarter of 2023, there were 98,994 visitors from Japan, compared to 9,068 visitors (+991.6%) in the first quarter of 2022, and 374,929 visitors (-73.6%) in the first quarter of 2019, prior to the COVID-19 pandemic.
- Visitors from Japan spent \$163.2 million in the first quarter of 2023, compared to \$31.5 million (+418.2%) in the first quarter of 2022, and \$524.1 million (-68.9%) in the first quarter of 2019. Daily visitor spending in the first quarter of 2023 was \$235 per person, compared to \$215 per person (+9.2%) in the first quarter of 2022, and \$240 per person (-2.0%) in the first quarter of 2019.
- In first quarter of 2023, there were 818 scheduled flights with 216,426 seats from Japan. Air capacity was much greater compared to the first quarter of 2022 (236 flights, +246.6%, with 51,243 seats, +322.4%), but remained below the first quarter of 2019 (2,022 flights, -59.5%, and 505,898 seats, -57.2%).
- 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

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- Consumption data for February 2023 showed an increase of approximately 9.2 percent compared to the pre-COVID period. Consumption expenditures for households of two or more people increased 59.2 percent for lodging and doubled for domestic package travel due to the effect of the resumption of the "The National Travel Assistance."
- There were 537,700 Japanese people who traveled outside of Japan as of February 2023, which was 65 percent down from February 2019. The number of international flights departing from Japan increased significantly, with 10,794 flights (+293.9%) and 2,576,944 seats (279.4%) offered at the 6 major domestic airports (NRT, KIX, HND, FUK, NGO, and CTS). 58,955 pax of those visited Hawai'i.
- Fuel surcharges for tickets issued in April and May 2023 dropped from 30,500 yen to 21,000 (ANA) 23,600 (HAL & JAL) yen for one-way, resulting round-trip fuel surcharges dropped down to less than 50,000 yen.
- Japanese government announced to downgrade COVID-19 to the same level with flu from May 8, 2023. The restriction of wearing masks had been loosened from March 13.

- Air Service: All Nippon Airlines (ANA): Currently operating double daily flights from Narita and Haneda. For summer vacation period, ANA will increase to triple daily flights. Hawaiian Airlines: Currently operating 6 times for all Hawai'i bound from Haneda, Narita, and Kansai (KIX). Starting from April 30, 2023, Fukuoka-Honolulu will resume as 3 times a week operation. Japan Airlines: Flight from Narita and Haneda has been operating 7 times daily. KIX – Honolulu is operating once a week. ZIPAIR: operated 3 flights a week from Narita. For 2023 spring vacation period (3/15 to 3/24), ZIPAIR increased to daily flights.

## Distribution by Island

JAPAN MMA (by Air)	2019	2020	2021	2022P	YTD Mar. 2023P	YTD Mar. 2022P	% Change
O'ahu	1,492,753	269,402	18,001	193,555	96,844	8,471	1043.2%
Maui County	48,524	8,265	775	6,019	2,611	631	313.8%
Maui	46,684	7,929	766	5,679	2,461	612	301.8%
Moloka'i	1,941	416	16	189	193	1	17873.5%
Lāna'i	2,300	128	19	335	133	20	572.7%
Kaua'i	25,333	3,622	361	2,956	1,346	208	547.6%
Island of Hawai'i	170,686	35,453	1,000	16,163	6,911	944	631.8%

## Airlift: Scheduled Seats and Flights

Scheduled seats	2023					2022					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
<b>JAPAN</b>	<b>216,426</b>	<b>238,309</b>	<b>286,627</b>	<b>407,804</b>	<b>1,149,166</b>	<b>51,243</b>	<b>64,306</b>	<b>161,113</b>	<b>202,484</b>	<b>479,146</b>	<b>322.4</b>	<b>270.6</b>	<b>77.9</b>	<b>101.4</b>	<b>139.8</b>
Fukuoka		7,506	11,120	13,344	31,970		0	0	0	0	NA	NA	NA	NA	NA
Nagoya	4007	3107	7385	15540	30,039	0	0	2587	3344	5,931	NA	NA	185.5	364.7	406.5
Osaka	28,512	31,785	40,487	61,536	162,320	3,809	3,614	21,336	27,861	56,620	648.5	779.5	89.8	120.9	186.7
Sapporo				7,784	7,784				0	0				NA	NA
Tokyo HND	88,113	96,464	103,582	147,152	435,311	14,946	20,530	66,995	84,574	187,045	489.5	369.9	54.6	74.0	132.7
Tokyo NRT	95,794	99,447	124,053	162,448	481,742	32,488	40,162	70,195	86,705	229,550	194.9	147.6	76.7	87.4	109.9

Scheduled flights	2023					2022					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
<b>JAPAN</b>	<b>818</b>	<b>861</b>	<b>1,009</b>	<b>1,471</b>	<b>4,159</b>	<b>236</b>	<b>277</b>	<b>642</b>	<b>773</b>	<b>1,928</b>	<b>246.6</b>	<b>210.8</b>	<b>57.2</b>	<b>90.3</b>	<b>115.7</b>
Fukuoka		27	40	48	115		0	0	0	0	NA	NA	NA	NA	NA
Nagoya	20	13	36	76	145	0	0	13	17	30	NA	NA	176.9	347.1	383.3
Osaka	108	121	149	220	598	14	13	83	105	215	671.4	830.8	79.5	109.5	178.1
Sapporo				28	28				0	0				NA	NA
Tokyo HND	368	383	409	580	1,740	70	98	285	357	810	425.7	290.8	43.5	62.5	114.8
Tokyo NRT	322	317	375	519	1,533	152	166	261	294	873	111.8	91.0	43.7	76.5	75.6

Source: DBEDT analysis from Diio Mi flight schedules as of March 21, 2023, subject to change.

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

JAPAN MMA (by Air)	2019	2020	2021	2022P	YTD Mar. 2023P	YTD Mar. 2022P	% Change
Group vs True Independent (Net)							
Group Tour	246,490	NA	203.8	13,664	9,063	362	2404.3%
True Independent (Net)	594,917	NA	18,155.3	148,880	62,993	8,393	650.5%
Leisure vs Business							
Pleasure (Net)	1,360,644	247,980	13,254	163,582	87,422	5,771	1414.8%
MCI (Net)	85,595	18,464	563	9,114	5,219	527	890.3%
Convention/Conf.	12,527	3,983	135	2,309	999	193	418.0%
Corp. Meetings	4,068	951	368	1,048	382	82	367.9%
Incentive	70,254	13,922	75	6,168	3,924	277	1317.6%

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	YTD Mar. 2023P	YTD Mar. 2022P	% Change
First Time Visitors (%)	31.7	NA	14.2	21.4	22.8	16.0	6.8
Repeat Visitors (%)	68.3	NA	85.8	78.6	77.2	84.0	-6.8

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	2022P	YTD Mar. 2023P	YTD Mar. 2022P	% Change
State tax revenue generated (\$ Millions) <sup>2/</sup>	262.43	NA	7.60	43.65	18.93	3.68	415.0%

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