



## Japan Fact Sheet

### Japan Overview

Japan is Hawai'i's largest international market and dynamic plans are being launched to grow interest in our islands. Hawai'i continues to thrive in an increasingly competitive travel environment. Instead of dropping prices and standards, HTJ is elevating its strategy. The organization is coming up with unique marketing campaigns to draw in new corporations to promote Hawai'i. It also nurtures established travel partners in Hawai'i and Japan to ensure that Hawai'i remains a preferred vacation destination for Japanese travelers.

### Year-to-Date September 2019 Quick Facts<sup>1</sup>

Visitor Expenditures: \$1.61 billion  
Primary Purpose of Stay: Pleasure (1,007,525) vs. MCI (62,524)  
Average Length of Stay: 5.94 days  
First Time Visitors: 31.4%  
Repeat Visitors: 68.6%

	2018	2017	% Change 2018 vs 2017	2019 Forecast (Quarter 3 2019)	% Change 2018 vs 2019 Forecast	YTD Sep. 2019P	YTD Sep. 2018	% change YTD
JAPAN MMA (by Air)								
Visitor Expenditures* (\$ Millions)	2,144.7	2,160.0	-0.7%	2,208.0	2.9%	1,609.3	1,603.2	0.4%
Visitor Days	8,892,748	9,082,588	-2.1%	9,309,479	4.7%	6,843,530	6,702,153	2.1%
Arrivals	1,489,778	1,525,343	-2.3%	1,589,452	6.7%	1,152,900	1,115,805	3.3%
Per Person Per Day Spending* (\$)	241.2	237.8	1.4%	237.2	-1.7%	235.2	239.2	-1.7%
Per Person Per Trip Spending* (\$)	1,439.6	1,416.1	1.7%	1,389.2	-3.5%	1,395.9	1,436.8	-2.8%
Length of Stay (days)	5.97	5.95	0.2%	5.86	-1.9%	5.94	6.01	-1.2%

\*Excludes supplemental business spending

### Contact Information

**Hawai'i Tourism Authority:** Minami Aoki, Market Manager  
Tel: (808) 973-2262  
[minami.aoki@gohta.net](mailto:minami.aoki@gohta.net)

**Hawai'i Tourism Japan:** Eric Takahata, Managing Director  
Tel: (808) 942-4114  
[etakahata@htjapan.jp](mailto:etakahata@htjapan.jp)

<sup>1</sup> 2019 visitor data are preliminary. January – June 2019 data were updated with immigration statistics from the National Travel and Tourism Office (NTTO).

2018 and 2017R visitor data are the final numbers and reflect updated immigration statistics from NTTO; updated airfare statistics from DIIO Mi Airline database, and final passenger counts for Airline reports

## Market Summary

---

- In 2018, visitor spending decreased slightly (-0.7%) to \$2.14 billion. Arrivals dropped 2.3 percent to 1,489,778 visitors, while daily spending was up (+1.4% to \$241 per person) compared to 2017. Through September 2019, visitor expenditures of \$1.61 billion (+0.4%) was up slightly from the same period last year. Arrivals increased (+3.3% to 1,152,900 visitors). However daily spending decreased (-1.7% to \$235 per person) compared to a year ago.
- In 2018, 93.9 percent of Japanese visitors went to O'ahu, 11.8 percent visited the island of Hawai'i, 3.3 percent visited Maui, and 1.7 percent visited Kaua'i. Through September 2019, 94.7 percent of Japanese visitors went to O'ahu, 10.5 percent visited the island of Hawai'i, 3.2 percent visited Maui, and 1.6 percent visited Kaua'i
- In 2018, 39.7 percent of Japanese visitors were FIT who made their own travel arrangements. Through September 2019, the portion of Japanese FIT visitors was 38.4 percent.
- In 2018, 33.1 percent of Japanese visitors were first timers to Hawai'i. Through September 2019, first time visitors comprised 31.4 percent.
- In 2018, the number of scheduled seats from Japan increased (+2.7%) to 2,042,595 compared to the previous year. Through September 2019, scheduled air seats from Japan decreased 1.8 percent to 1,498,414 seats.

## Market Conditions

---

- A major typhoon, Hagibis, swept through central, eastern and northeastern Japan and triggered massive flooding throughout the country. Nearly 4,000 people remain in shelters, 43,000 homes lacking water and death tolls surpassed 80.
- The exchange rate was at 107.41 JPY to USD in September 2019. Economic outlook is declining as uncertainties from the trade wars occurring between Japan and Korea continue.
- Trade disputes between Japan and Korea continue, causing significant strains on both countries' economies. Impacts are being seen in the travel market with Korean visitors to Japan dropping by close to 60% year over year. In October, signs of the two nations working to mend relations have been seen as leaders from the two nations agreed to discuss the issues during the Korean leaders' visit to Japan for the emperor's enthronement ceremony.
- Growth in Japanese outbound travelers continue with 13.3 million travelers as of August YTD, marking a 7.6 percent growth. This marks the 17th consecutive month of growth.
- Traditionally popular competitive destinations in Asia, Guam and Europe are exhibiting strong popularity amongst travelers. Competitive Asian beach destinations such as Danang, Guam, Ko Samui, etc. are rapidly garnering the attention of travelers as increased air routes improve access, together with strong growth to Guam as political concerns decline. Despite trade wars with Korea, it also remains a highly popular destination for Japanese travelers to visit.
- Social unrest in Hong Kong may prompt Japanese visitors to alter travel itineraries to other destinations including Hawai'i from the traditionally popular destination. Japanese consumers

show frequent tendencies to be risk averse and avoid potentially dangerous situations. Japanese visitors to Hong Kong declined by 25.2% in August.

- Round trip fuel surcharge rates were lowered to 12,000 yen for tickets issued from October 1.
- ANA continues operation of their first and second Airbus A380 aircraft in the ANA blue livery and emerald green livery, with frequency of the A380 at 10 flights per week.
- Approvals were given to Hawaiian Airlines and Delta Air Lines for additional slots at Haneda Airport. Amongst the approved routes one route for Honolulu was allotted for each of the carriers. Announcements will be made on a later date for domestic carriers.
- Delta Air Lines has announced that all air service from Tokyo including service to Honolulu will be shifted from Narita to Haneda starting in March 2020. This is beneficial for Japanese travelers as Haneda Airport is located much closer to the city center, greatly improving convenience for consumers.

## Distribution by Island

JAPAN MMA (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Sep. 2019P	YTD Sep. 2018	% change YTD
O'ahu	1,399,307	1,454,594	-3.8%	1,092,092	1,045,142	4.5%
Maui County	50,000	57,207	-12.6%	37,854	37,923	-0.2%
Maui	48,450	55,583	-12.8%	36,480	36,624	-0.4%
Moloka'i	1,200	2,421	-50.4%	1,346	859	56.7%
Lāna'i	1,763	2,288	-22.9%	1,632	1,220	33.8%
Kaua'i	24,806	25,442	-2.5%	18,364	18,367	0.0%
Island of Hawai'i	176,499	183,907	-4.0%	121,209	138,427	-12.4%

## Airlift

Departure City	2019					2018					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
JAPAN	505,898	475,392	517,124	500,171	1,998,585	479,110	495,286	551,990	516,209	2,042,595	5.6	-4.0	-6.3	-3.1	-2.2
Fukuoka	14,916	6,780		5,560	27,256	14,464	17,176	18,984	14,916	65,540	3.1	-60.5		-62.7	-58.4
Nagoya	36,411	38,473	42,328	36,904	154,116	35,252	37,748	40,696	35,950	149,646	3.3	1.9	4.0	2.7	3.0
Osaka	134,549	105,119	98,893	102,814	441,375	103,535	117,672	131,871	138,797	491,875	30.0	-10.7	-25.0	-25.9	-10.3
Sapporo	12,232	10,842	11,676	10,842	45,592	10,317	10,842	11,120	10,842	43,121	18.6	0.0	5.0	0.0	5.7
Tokyo HND	72,180	72,982	73,784	73,784	292,730	71,250	72,982	73,784	73,784	291,800	1.3	0.0	0.0	0.0	0.3
Tokyo NRT	235,610	241,196	290,443	270,267	1,037,516	244,292	238,866	275,535	241,920	1,000,613	-3.6	1.0	5.4	11.7	3.7

Source: Diio Mii airline schedules, updated August 26, 2019.

## Group vs. FIT; Leisure vs. Business

JAPAN MMA (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Sep. 2019P	YTD Sep. 2018	% change YTD
Group vs FIT						
Group tour	256,350	271,978	-5.7%	178,650	194,371	-8.1%
True Independent	591,168	538,394	9.8%	442,474	447,814	-1.2%
Leisure vs business						
Pleasure (Net)	1,243,669	1,267,850	-1.9%	1,007,525	946,772	6.4%
MCI (Net)	96,102	95,192	1.0%	62,524	73,487	-14.9%
Convention/Conf.	17,355	15,813	9.7%	10,138	14,188	-28.5%
Corp. Meetings	3,372	4,843	-30.4%	2,565	2,002	28.1%
Incentive	77,439	76,223	1.6%	50,884	58,871	-13.6%

## First Timers vs. Repeat Visitors

JAPAN MMA (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Sep. 2019P	YTD Sep. 2018	% change YTD
1st timers (%)	33.1	34.8	-1.7	31.4	32.6	-1.2
Repeaters (%)	66.9	65.2	1.7	68.6	67.4	1.2

## Tax Revenue

JAPAN MMA (by Air)	2018	2017R	% Change 2018 vs 2017	YTD Sep. 2019P	YTD Sep. 2018	% change YTD
State tax revenue generated* (\$ Millions)	250.35	252.13	-0.7%	187.85	187.14	0.4%

\*State government tax revenue generated (direct, indirect, and induced)