



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 December 2020 Quick Facts¹

Visitor Expenditures: NA (Not available)
 Primary Purpose of Stay: Pleasure (254,875) vs. MCI (19,382)
 Average Length of Stay: 6.47 days
 First Time Visitors: 32.2%
 Repeat Visitors: 67.8%

	2018	2019	% Change 2019 vs 2018	2020* Forecast	% Change 2019 vs 2020 Forecast	YTD Dec. 2020P	YTD Dec. 2019	% change YTD
JAPAN MMA (by Air)								
Visitor Expenditures* (\$ Millions)	2,144.7	2,248.3	4.8%	546.1	-75.7%	NA	2,248.3	NA
Visitor Days	8,892,748	9,306,767	4.7%	2,261,675	-75.7%	1,785,502	9,306,767	-80.8%
Arrivals	1,489,778	1,576,205	5.8%	349,500	-77.8%	297,243	1,576,205	-81.1%
Average Daily Census	24,364	25,498	4.7%	6,751	-73.5%	4,878	25,498	-80.9%
Per Person Per Day Spending* (\$)	241.2	241.6	0.2%	241.5	0.0%	NA	241.6	NA
Per Person Per Trip Spending* (\$)	1,439.6	1,426.4	-0.9%	1,562.5	9.5%	NA	1,426.4	NA
Length of Stay (days)	5.97	5.90	-1.1%	6.47	9.6%	6.01	5.90	1.7%

*Dept. of Business, Economic Development & Tourism (DBEDT) 2020 forecasts.

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¹ 2020 visitor data are preliminary. 2019 and 2018 visitor data are the final numbers and reflect updated airfare statistics from DIO Mi Airline database, and final passenger counts from Airline Traffic Summary reports.

Market Summary

Beginning October 15, passengers arriving from out-of-state and traveling inter-county could bypass the mandatory 14-day self-quarantine with a valid negative COVID-19 NAAT test result from a Trusted Testing and Travel Partner through the state's Safe Travels program. Effective November 24, all trans-Pacific travelers participating in the pre-travel testing program were required to have a negative test result before their departure to Hawai'i, and test results would no longer be accepted once a traveler arrived in Hawai'i. On December 2, Kaua'i County temporarily suspended its participation in the state's Safe Travels program, making it mandatory for all travelers to Kaua'i to quarantine upon arrival. On December 10, the mandatory quarantine was reduced from 14 to 10 days in accordance with the U.S. Centers for Disease Control and Prevention's (CDC) guidelines. The counties of Hawai'i, Maui, and Kalawao (Moloka'i) also had a partial quarantine in place in December. In addition, the CDC continued to enforce the "No Sail Order" on all cruise ships.

Japanese nationals returning from abroad must quarantine for 14 days. The growing global spread of COVID19 led to increased travel restrictions effective December 28 until end of January 2021. Japanese residents with VISA arranged short outbound business trip were no longer exempted from the 14-day quarantine.

In December 2020, 1,889 visitors arrived from Japan compared to 136,635 visitors a year ago. Of the 1,889 visitors, 1,799 arrived on international flights from Japan and 90 came on domestic flights. Visitor spending data were not available.

- For all of 2020, arrivals decreased 81.1 percent to 297,243 visitors. Visitor days declined 80.8 percent. The average daily census showed 4,878 visitors per day, an 80.9 percent drop compared to 2019.
- For 2020, 93.3 percent of Japanese visitors went to O'ahu, 12.1 percent visited the island of Hawai'i, 2.8 percent visited Maui, and 1.3 percent visited Kaua'i. The portion of Japanese True Independent visitors was 38.9 percent. First time visitors comprised 32.2 percent.
- In 2020, scheduled air seats decreased 75.8 percent to 483,574 seats.
- In 2019, spending by Japanese visitors rose 4.8 percent to \$2.25 billion. Both visitor arrivals (+5.8% to 1,576,205) and visitor days (+4.7%) increased while daily visitor spending (+0.2% to \$242 per person) was similar to 2018. The average daily census showed 25,498 visitors per day in 2019, an increase of 4.7 percent compared to 2018.
- In 2019, 94.7 percent of Japanese visitors went to O'ahu, 10.8 percent visited the island of Hawai'i, 3.0 percent visited Maui, and 1.6 percent visited Kaua'i. In 2019, 37.7 percent of Japanese visitors were True Independent who made their own travel arrangements; and 31.9 percent of Japanese visitors were first timers to Hawai'i.
- In 2019, air capacity from Japan declined (-2.1%) from 2018 to 1,999,204 scheduled seats.

Market Conditions

- The Japanese Cabinet approved a ¥21.84 trillion third supplementary budget for fiscal 2020, to finance the government's latest economic package aimed at ensuring the coronavirus-stricken economy stays on a recovery track. The budget boosts Japan's total spending for fiscal 2020 to exceed ¥175 trillion, with three extra budgets compiled in addition to the initial budget of ¥102.66 trillion, fueling fear of a further deterioration in the country's fiscal health — the worst among major developed nations.
- Japan's economy in the July-September period grew an annualized real 22.9 percent from the previous quarter, the government said Tuesday, upgrading the preliminary figure of 21.4 percent on firmer private consumption. Private consumption, which accounts for more than half of Japan's GDP, soared 5.1 percent, revised upward from the 4.7 percent drop in the preliminary report released Nov. 16.
- Prime Minister Yoshihide Suga on declared a second state of emergency in Tokyo, Kanagawa, Saitama and Chiba prefectures to contain the spreading COVID-19. This declaration has enforced from Jan. 8 until at least Feb. 7. Now, due to high infection throughout the Japan, now 3 additional prefectures (Osaka, Kyoto and Hyogo) are now considering extension state of emergency. Japan government tries to have stable environment for not only public as well as business so that they can re-shift to recovery.
- Japanese Government excluded Sapporo, Tokyo, Nagoya and Osaka from Go to Travel campaign until 12/27 to visit because these areas are identified as high infections area. Also, it asked the people from these areas not to travel outside from their home prefecture. During New Year holiday season (12/28 -1/11), the government temporarily stop the Go to Travel campaign as prevention for all prefectures. The cancellation fees are covered by the government funds during the period for existing reservations.
- Japan Travel Agency is planning to start "Managed Travel" style with COVID-19 period as campaign. It is launching the special website to provide the initiatives, ideas, spread prevention notes to educate travel business owners. Also, it provides platform for Travel Agencies to promote "Managed Travel" service to market.
- Global spread of COVID19 affected Japan and the government restricted new entry of foreign nationals to Japan starting from 12/28 until end of January to prevent increasing COVID19 infection. Also, this restriction does not exempt 14 days quarantine for returning Japanese nationals and foreign residents with VISA arranged short outbound business trip.
- Airlift - Operation & Suspension: Four airlines (ANA/Hawaiian/JAL/ZIPAIR) operated during December 2020. Total 50 flights with about 12,333 seats serviced.
- Service from the following airlines remained suspended: Delta (until 3/28). Korean (until 12/31) and United (until end of January 2021).
- In January 2021, total 59 flights with 15,337 seats. In February 2021, total 51 flights with 13,554 seats.

Distribution by Island

JAPAN MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Dec. 2020P	YTD Dec. 2019	% change YTD
O'ahu	1,399,307	1,492,753	6.7%	277,354	1,492,753	-81.4%
Maui County	50,000	48,524	-3.0%	8,551	48,524	-82.4%
Maui	48,450	46,684	-3.6%	8,212	46,684	-82.4%
Moloka'i	1,200	1,941	61.8%	421	1,941	-78.3%
Lāna'i	1,763	2,300	30.5%	133	2,300	-94.2%
Kaua'i	24,806	25,333	2.1%	3,723	25,333	-85.3%
Island of Hawai'i	176,499	170,686	-3.3%	36,014	170,686	-78.9%

Airlift

Departure City	2020					2019					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
JAPAN	465,328	744	930	127,983	594,985	505,898	475,392	517,124	500,790	1,999,204	-8.0	-99.8	-99.8	-74.4	-70.2
Fukuoka	13,622	0		4,726	18,348	14,916	6,780		5,560	27,256	-8.7	100.0		-15.0	-32.7
Nagoya	32,280	0	0	7,409	39,689	36,411	38,473	42,328	36,904	154,116	-11.3	100.0	-100.0	-79.9	-74.2
Osaka	92,526	0	0	27,436	119,962	134,549	105,119	98,893	102,814	441,375	-31.2	100.0	-100.0	-73.3	-72.8
Sapporo	10,008	0	0	3,614	13,622	12,232	10,842	11,676	10,842	45,592	-18.2	100.0	-100.0	-66.7	-70.1
Tokyo HND	60,685	744	930	43,148	105,507	72,180	72,982	73,784	73,784	292,730	-15.9	-99.0	-98.7	-41.5	-64.0
Tokyo NRT	256,207	0	0	41,650	297,857	235,610	241,196	290,443	270,886	1,038,135	8.7	100.0	-100.0	-84.6	-71.3

Source: HTA analysis based on scheduled Seats from Diio Mi flight schedules as of October 27, 2020, subject to change.

Group vs. True Independent; Leisure vs. Business

JAPAN MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Dec. 2020P1/	YTD Dec. 2019	% change YTD
Group vs True Independent (Net)						
Group tour	256,350	246,490	-3.8%	50,668	246,490	-79.4%
True Independent (Net)	591,168	594,917	0.6%	115,650	594,917	-80.6%
Leisure vs business						
Pleasure (Net)	1,243,669	1,360,644	9.4%	254,875	1,360,644	-81.3%
MCI (Net)	96,102	85,595	-10.9%	19,382	85,595	-77.4%
Convention/Conf.	17,355	12,527	-27.8%	3,980	12,527	-68.2%
Corp. Meetings	3,372	4,068	20.6%	930	4,068	-77.1%
Incentive	77,439	70,254	-9.3%	14,855	70,254	-78.9%

1/ Note: Beginning August 2020, certain categories reflect only domestic data (italicized) as international data were not available.

First Timers vs. Repeat Visitors

JAPAN MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Dec. 2020P1/	YTD Dec. 2019	% change YTD
1st timers (%)	33.1	31.7	-1.3	32.2	31.7	0.5
Repeaters (%)	66.9	68.3	1.3	67.8	68.3	-0.5

1/ Note: Beginning August 2020, certain categories reflect only domestic data (italicized) as international data were not available.

Tax Revenue

JAPAN MMA (by Air)	2018	2019	% Change 2019 vs 2018	YTD Dec. 2020P	YTD Dec. 2019	% change YTD
State tax revenue generated* (\$ Millions)	250.35	262.43	4.8%	NA	262.43	NA

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