



Japan Fact Sheet

Japan Overview

The Hawai'i Tourism Authority selected a.Link LLC. for Brand Marketing 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) will leverage the regions' longstanding ties and the Safe Travels Program to advance tourism recovery efforts in 2021. HTJ will develop a new model of sustainable tourism in Hawai'i by embarking on a targeted marketing strategy to rebuild tourism in a responsible manner. Rooted in education and experiences, HTJ's sustainable tourism framework aims to inspire the values of *aloha* and *mālama* with travelers and industry partners while developing new programs to connect visitors with the community.

Year-to-Date November 2021 Quick Facts^{1/}

Visitor Expenditures: \$68.4 million
 Primary Purpose of Stay: Pleasure (14,033) vs. MCI (574)
 Average Length of Stay: 15.82 days
 First Time Visitors: 14.8%
 Repeat Visitors: 85.2%

JAPAN MMA (by Air)	2019	2020*	% Change 2020 vs 2019	2021 Annual Forecast ^{1/}	YTD Nov. 2021	YTD Nov. 2020	% Change YTD
Visitor Expenditures (\$ Millions)	2,248.3	NA	NA	74.2	68.4	NA	NA
Visitor Days	9,306,767	1,719,843	-81.5%	341,119	312,994	1,700,807	-81.6%
Arrivals	1,576,205	289,137	-81.7%	20,633	19,784	287,414	-93.1%
Average Daily Census	25,498	4,699	-81.6%	935	937	5,077	-81.5%
Per Person Per Day Spending (\$)	241.6	NA	NA	217.4	218.5	NA	NA
Per Person Per Trip Spending (\$)	1,426.4	NA	NA	3,594.3	3,457.4	NA	NA
Length of Stay (days)	5.90	5.95	0.7%	16.53	15.82	5.92	167.3%

NA=Annual 2020 visitor spending statistics and comparative year-to-date 2020 statistics were not available. Due to COVID-19 restrictions, fielding for visitor spending was limited for 2020.

^{1/}Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 3, 2021).

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^{1/} 2021 visitor data are preliminary. 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

In November 2021, passengers arriving from out-of-state could bypass the State's mandatory 10-day self-quarantine if they were fully vaccinated in the United States or with a valid negative COVID-19 NAAT test result from a Trusted Testing Partner prior to their departure through the Safe Travels program. The U.S. Centers for Disease Control and Prevention (CDC) continued to enforce restrictions on cruise ships through a "Conditional Sail Order", a phased approach for the resumption of passenger cruises to mitigate the risk of spreading COVID-19 onboard.

For most of November 2021, the Japanese government required proof of a negative PCR test within 72 hours for all passengers into Japan, including returning Japanese nationals. Fully vaccinated travelers were required to quarantine for 10 days. On November 30, 2021, the Japan government announced that quarantine measures will be tightened in response to the emergence of the Omicron variant. Entry of non-resident foreign nationals have been suspended. Travelers permitted to enter Japan will be required to quarantine at home or in a hotel for 14 days.

- Through the first 11 months of 2021, there were 19,784 visitors from Japan compared to 287,414 visitors (-93.1%) in the first 11 months of 2020, versus 1,439,570 visitors (-98.6%) in the first 11 months of 2019.
- For the first 11 months of 2021, total visitor spending was \$68.4 million, a 96.6 percent drop from \$2.04 billion in the first 11 months of 2019. Comparative 2020 visitor spending data was not available.
- Through the first 11 months of 2021, there were 450 scheduled flights with 112,229 seats from Japan. In comparison, there were 1,740 flights with 471,788 seats in the first 11 months of 2020, versus 7,052 flights with 1,825,761 seats in the first 11 months of 2019.
- Comparing the first 11 months of 2021 vs. the first 11 months of 2020, most flights were postponed except for limited service from Osaka (14,734 seats, -84.1%), Tokyo-Haneda (40,486, -36.3%) and Tokyo-Narita (57,009, -78.1%).
- For all of 2020, arrivals decreased 81.7 percent to 289,137 visitors. Visitor days declined 81.5 percent. The average daily census was 4,699 visitors, an 81.6 percent drop compared to 2019.
- For 2020, 93.2 percent of Japanese visitors went to O'ahu, 12.3 percent visited the island of Hawai'i, 2.7 percent visited Maui, and 1.3 percent visited Kaua'i.
- 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 was 25,498 visitors 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

- **Economic Stimulus Measures:** Spending by the Japanese central government on a set of economic stimulus measures to be finalized by end of November 2021 will exceed ¥40 trillion (\$350 billion), expanding from its initial plan of around ¥30 trillion. The package, which Prime Minister Kishida's Cabinet is expected to approve also include financial aid of up to ¥2.5 million each for businesses suffering from plunging revenues due to the pandemic, and wage hikes of about 3 percent for childcare and nursery school workers as well as nurses.
- **Vaccination:** As of December 20, 100.1 million Japanese (79.1%) have been vaccinated once, and 98.3 million people (77.6%) have been fully vaccinated.
- **Vaccine Passport:** Japan's Vaccine Certificate (VC) program for oversea travel is now accepted by 74 countries/regions.
- **Omicron Variant Situation:** Japan government announced on November 30 that the quarantine for returning residents would revert to 14 days (from 10 days) starting December 5 and requiring to be quarantined in government designated facility for 3 days.
- **GoTo Travel (Domestic Travel Stimulus):** The government is currently ironing out details of how and when to resume the program. The GoTo Travel campaign initially kicked off in July last year and was backed by a huge ¥1.35 trillion budget to stimulate tourism demand that had been devastated by the pandemic.
- **Japan Overseas Travel:** According to Japan National Tourism Organization (JNTO), Japanese outbound travel for November 2021 was 51,800 passengers (-96.8% vs 2019).
- **Airlift November 2021:** 53 flights (13,379 air seats). December 2021: 81 flights (20,016 seats). January 2022: 64 flights (15,868 seats). JAL announced daily operation from Narita starting February and adding 2 flights from Haneda.

Distribution by Island

JAPAN MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Nov. 2021	YTD Nov. 2020	% change YTD
O'ahu	1,492,753	269,402	-82.0%	18,936	267,717	-92.9%
Maui County	48,524	8,265	-83.0%	666	8,222	-91.9%
Maui	46,684	7,929	-83.0%	659	7,886	-91.6%
Moloka'i	1,941	416	-78.6%	17	416	-96.0%
Lāna'i	2,300	128	-94.4%	17	128	-86.9%
Kaua'i	25,333	3,622	-85.7%	277	3,622	-92.4%
Island of Hawai'i	170,686	35,453	-79.2%	807	35,425	-97.7%

Airlift: Scheduled Seats

Departure City	2021					2020					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
JAPAN	30,717	24,354	39,572	75,389	170,032	465,328	744	930	16,572	483,574	-93.4	3173.4	4155.1	354.9	-64.8
Fukuoka	0	0	0	2,224	2,224	13622	0	0	0	13,622	-100.0	NA	NA	NA	-83.7
Nagoya	0	0	0	186	186	32280	0	0	0	32280	-100.0	NA	NA	NA	-99.4
Osaka	5,004	3,614	3,892	7,431	19,941	92,526	0	0	1,390	93,916	-94.6	NA	NA	434.6	-78.8
Sapporo	0	0	0	1,946	1,946	10008	0	0	0	10,008		NA	NA	NA	-80.6
Tokyo HND	12,500	9,620	11,892	24,352	58,364	60,685	744	930	5,362	67,721	-79.4	1193.0	1178.7	354.2	-13.8
Tokyo NRT	13,213	11,120	23,788	39,250	87,371	256,207	0	0	9,820	266,027	-94.8	NA	NA	299.7	-67.2

Source: DBEDT analysis based on scheduled Seats from Diao Mi flight schedules as of October 20, 2021, subject to change.

Group vs. True Independent; Leisure vs. Business

JAPAN MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Nov. 2021	YTD Nov. 2020	% change YTD
Group vs True Independent (Net)						
Group tour	246,490	NA	NA	274	NA	NA
True Independent (Net)	594,917	NA	NA	18,875	NA	NA
Leisure vs business						
Pleasure (Net)	1,360,644	247,980	-81.8%	14,033	246,739	-94.3%
MCI (Net)	85,595	18,464	-78.4%	574	18,425	-96.9%
Convention/Conf.	12,527	3,983	-68.2%	110	3,969	-97.2%
Corp. Meetings	4,068	951	-76.6%	411	927	-55.7%
Incentive	70,254	13,922	-80.2%	64	13,921	-99.5%

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	% Change 2020 vs 2019	YTD Nov. 2021	YTD Nov. 2020	% change YTD
1st timers (%)	31.7	NA	NA	14.8	NA	NA
Repeaters (%)	68.3	NA	NA	85.2	NA	NA

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	% Change 2020 vs 2019	YTD Nov. 2021	YTD Nov. 2020	% change YTD
State tax revenue generated (\$ Millions) ^{2/}	262.43	NA	NA	7.98	NA	NA

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