



Japan Fact Sheet

Japan Overview

The Hawai'i Tourism Authority selected a.Link LLC. for Brand Marketing and 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) continues to leverage the regions' longstanding ties to advance tourism recovery efforts in 2022. HTJ's regenerative tourism framework aims to inspire the values of *aloha* and *mālama* with travelers and industry partners while developing consumer, public relations, and travel trade programs to educate and connect visitors with the local community.

Year-to-date July 2022 Quick Facts^{1/}

Visitor Expenditures: \$129.5 million
Primary Purpose of Stay: Pleasure (45,666) vs. MCI (3,220)
Average Length of Stay: 9.64 days
First Time Visitors: 21.2%
Repeat Visitors: 78.8%

	2019	2020	2021	2022 Annual Forecast*	YTD July 2022P	YTD July 2021	% Change YTD
JAPAN MMA (by Air)							
Visitor Expenditures (\$ Millions)	2,248.3	NA	65.1	805.1	129.5	32.2	302.0%
Visitor Days	9,306,767	1,719,843	294,720	3,167,750	559,900	148,327	277.5%
Arrivals	1,576,205	289,137	18,936	521,380	58,057	8,541	579.7%
Average Daily Census	25,498	4,699	807	8,679	2,641	700	277.5%
Per Person Per Day Spending (\$)	241.6	NA	220.9	254.2	231.2	217.1	6.5%
Per Person Per Trip Spending (\$)	1,426.4	NA	3,438.8	1,544.3	2,230.0	3,770.8	-40.9%
Length of Stay (days)	5.90	5.95	15.56	6.08	9.64	17.37	-44.5%

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) 2022 annual forecast (Quarter 1, 2022).

Contact Information

Hawai'i Tourism Authority: Jadie Goo, Sr. Brand Manager
Tel: (808) 973-2252
jadie@gohta.net

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

^{1/} 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

Prior to the global COVID-19 pandemic, Hawai'i achieved record-level visitor expenditures and arrivals in 2019 through February 2020. On March 26, 2020, the state implemented mandatory quarantine and travel restrictions. Subsequently, nearly all trans-Pacific and interisland flights were canceled, cruise ship activities were suspended and tourism to the islands all but shut down. In October 2020, the state initiated the Safe Travels program, which allowed travelers to bypass quarantine if they had a valid negative COVID test. Through March 25, 2022, domestic passengers could bypass the state's mandatory self-quarantine if they were vaccinated or have a negative COVID pre-travel test. The Safe Travels Program ended on March 26, 2022. In July 2022, there were no travel restrictions for passengers arriving to Hawai'i on domestic direct flights from the U.S. Mainland, or for passengers arriving on direct international flights.

- Through the first seven months of 2022 there were 58,057 visitors from Japan compared to 868,821 visitors (-93.3%) in the first seven months of 2019.
- Visitors from Japan spent \$129.5 million in the first seven months of 2022 compared to \$1.22 billion (-89.4%) in the first seven months of 2019
- There were 639 scheduled flights with 147,433 seats in the first seven months of 2022, compared to 4,529 flights with 1,146,682 seats in the first seven months of 2019.
- For all of 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

- The Japanese government plans to lower its inflation-adjusted economic growth forecast for fiscal 2022 to about 2 percent, which is down from January's forecast for 3.2 percent growth. It is predicted that GDP will recover to the level before pandemic in Fiscal year 2023. Consumption of services such as travel is recovering, personal consumption continues to pick up, and personal consumption based on GDP in the April - June 2022 period is expected to increase by 1.1 percent compared to the previous quarter.
- According to a May 2022 household survey released by the Ministry of Internal Affairs and Communications, households with two or more people spent 287,687 yen, down 0.5 percent from previous year. This is the third straight month of decline and there is a movement to refrain from buying. On the other hand, eating out and travel-related consumption are increasing because there are no movement restrictions during the period.
- As of August 8, 2022, 81 percent of the population are fully vaccinated and 63.4 percent have received the booster shot.
- According to the Japan National Tourism Organization (JNTO), the number of Japanese overseas travelers leaving the country in June 2022 was 171,500. Compared to the same month in 2019, it decreased by 88.7 percent. But since April 2022, when the number exceeded 100,000 for the first time in two years, it has continued to exceed the previous month.

- According to JNTO, the number of international flights departing from six major domestic airports (Narita, Kansai, Haneda, Fukuoka, Nagoya, Sapporo) in June 2022 increased by 58.8 percent year-on-year to 3,853 flights, and the number of seats increased by 58 percent to 932,436 seats.
- In July 2022, a total of 126 scheduled flights operated by four airlines: ANA, Hawaiian Airlines, JAL, and ZIPAIR, according to DIIO Mi flight schedules. With summer vacation period getting closer, all airlines started to increase number of flights and seats compared to May.
- Hawaiian Airlines TV commercials for the Japanese market started to air and Japan airlines is also holding events in local areas to promote Hawai'i routes.

Distribution by Island

JAPAN MMA (by Air)	2019	2020	2021	YTD July 2022P	YTD July 2021	% Change YTD
O'ahu	1,492,753	269,402	18,001	55,846	8,182	582.6%
Maui County	48,524	8,265	775	2,206	257	757.5%
Maui	46,684	7,929	766	2,016	256	686.6%
Moloka'i	1,941	416	16	72	7	1001.7%
Lāna'i	2,300	128	19	218	10	2153.8%
Kaua'i	25,333	3,622	361	1,031	126	719.6%
Island of Hawai'i	170,686	35,453	1,000	4,445	274	1521.8%

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	242,527	452,051	810,127	30,717	24,354	32,490	44,205	131,766	66.8	164.0	646.5	922.6	514.8
Fukuoka			3,614	14,734	18,348			0	0	0	NA	NA	NA	NA	NA
Nagoya			8,762	21,988	30,750			0	186	186	NA	NA	NA	11721.5	16432.3
Osaka	3,809	3,614	28,067	60,759	96,249	5,004	3,614	3,892	3,614	16,124	-23.9	0.0	621.1	1581.2	496.9
Sapporo			3,058	10,842	13,900			0	0	0	NA	NA	NA	NA	NA
Tokyo HND	14,946	20,530	82,945	155,360	273,781	12,500	9,620	11,520	12,876	46,516	19.6	113.4	620.0	1106.6	488.6
Tokyo NRT	32,488	40,162	116,081	188,368	377,099	13,213	11,120	17,078	27,529	68,940	145.9	261.2	579.7	584.3	447.0

Source: DBEDT analysis based on scheduled seats from Diio Mi flight schedules as of June 24, 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	937	1,644	3,094	118	102	128	181	529	100.0	171.6	632.0	808.3	484.9
Fukuoka			13	53	66			0	0	0	NA	NA	NA	NA	NA
Nagoya			38	92	130			0	1	1	NA	NA	NA	9100.0	12900.0
Osaka	14	13	110	219	356	18	13	14	13	58	-22.2	0.0	685.7	1584.6	513.8
Sapporo			11	39	50			0	0	0	NA	NA	NA	NA	NA
Tokyo HND	70	98	338	606	1,112	53	49	55	63	220	32.1	100.0	514.5	861.9	405.5
Tokyo NRT	152	166	427	635	1,380	47	40	59	104	250	223.4	315.0	623.7	510.6	452.0

Source: DBEDT analysis based on scheduled flights from Diio Mi flight schedules as of June 24, 2022, subject to change.

Group vs. True Independent; Leisure vs. Business

JAPAN MMA (by Air)	2019	2020	2021	YTD July 2022P	YTD July 2021	% Change YTD
Group vs True Independent (Net)						
Group tour	246,490	NA	203.8	3,678	65	5590.5%
True Independent (Net)	594,917	NA	18,155.3	46,185	8,300	456.4%
Leisure vs business						
Pleasure (Net)	1,360,644	247,980	13,254	45,666	5,941	668.7%
MCI (Net)	85,595	18,464	563	3,220	225	1329.0%
Convention/Conf.	12,527	3,983	135	1,012	38	2565.6%
Corp. Meetings	4,068	951	368	465	164	183.3%
Incentive	70,254	13,922	75	1,949	23	8287.5%

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	2021	YTD July 2022P	YTD July 2021	% Change YTD
1st timers (%)	31.7	NA	14.2	21.2	14.1	7.1
Repeaters (%)	68.3	NA	85.8	78.8	85.9	-7.1

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	YTD July 2022P	YTD July 2021	% Change YTD
State tax revenue generated (\$ Millions) ^{2/}	262.43	NA	7.60	15.02	3.76	299.5%

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