



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 September 2022 Quick Facts^{1/}

Visitor Expenditures:	\$225 million
Primary Purpose of Stay:	Pleasure (92,406) vs. MCI (4,206)
Average Length of Stay:	8.83 days
First Time Visitors:	20.5%
Repeat Visitors:	79.5%

JAPAN MMA (by Air)	2019	2020	2021	2022 Annual Forecast*	YTD Sep. 2022P	YTD Sep. 2021	% Change YTD
Visitor Expenditures (\$ Millions)	2,248.3	NA	65.1	468.1	225.0	45.3	397.0%
Visitor Days	9,306,767	1,719,843	294,720	2,024,134	975,880	208,288	368.5%
Arrivals	1,576,205	289,137	18,936	209,890	110,534	12,469	786.5%
Average Daily Census	25,498	4,699	807	5,546	3,575	763	368.5%
Per Person Per Day Spending (\$)	241.6	NA	220.9	231.2	230.5	217.4	6.1%
Per Person Per Trip Spending (\$)	1,426.4	NA	3,438.8	2,230.0	2,035.4	3,630.7	-43.9%
Length of Stay (days)	5.90	5.95	15.56	9.64	8.83	16.70	-47.1%

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 3, 2022).

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^{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 September 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 nine months of 2022 there were 110,534 visitors from Japan compared to 1,173,477 visitors (-90.6%) in the first nine months of 2019.
- Visitors from Japan spent \$225 million in the first nine months of 2022 compared to \$1.65 billion (-86.4%) in the first nine months of 2019.
- There were 1,155 scheduled flights with 276,662 seats in the first nine months of 2022 compared to 5,836 flights with 1,498,414 seats in the first nine 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

- With the lifting of the ban on visa-free and individual travel to Japan from October 11, 2022 and the lifting of the upper limit on the number of people visiting Japan, it is expected that there will be a recovery in the number of visitors to Japan from overseas, which will revitalize the domestic economy and serve as an opportunity to put a brake on the continued depreciation of the yen. On the other hand, with the launch of the nationwide travel support and event discounts, domestic travel will begin to revive.
- In response to the continued depreciation of the yen, which temporarily reached the 145-yen level to the dollar, the Bank of Japan decided to intervene for the first time in 24 years by buying the yen and selling the dollar in order to prevent an increase in the burden on household budgets due to soaring prices. On the other hand, consumption has increased compared to before the pandemic, with consumption in the second half of August 2022 increasing by 5.3 percent and consumption of goods by 15.4 percent. Consumption of services including travel is declining and is expected to recover from October.
- According to the Japan National Tourism Organization, an estimated 386,400 Japanese people left the country in August 2022, an increase of 100,000 over July due to the summer vacation season. Although it decreased by 81.7 percent compared to 2019, the number of international flights from each major airport exceeded 100 percent compared to previous year. According to

IATA's latest forecast, recovery of passenger levels as 2019 is expected in 2025, as the relaxation of border measures in the Asia-Pacific region has been delayed compared to other regions.

- As of October 10, 80.4 percent are fully vaccinated and 65.5 percent have taken booster shots.
- The increase in fuel surcharge for tickets issued in October 2022 has a significant impact. Round-trip JAL costs 74,800 yen, and ANA costs 73,400 yen, which is almost the same as the air ticket price.
- All Nippon Airways (ANA): Currently operate five times a week from Haneda and 2 times a week from Narita. Starting from October 30, ANA will operate daily 7 times from Haneda and 3 times from Narita. All Narita flights are operating with FLYING HONU A380.
- Hawaiian Airlines (HA): Operate daily flights for Haneda, Narita, Kansai since August 2022.
- Japan Airlines (JAL): Flights from Narita and Haneda have been operating daily. KIX-Honolulu and Narita-Kona resumed in August 2022. Narita-Kona has decreased to operate 3 times a week in September and will be suspended in October 2022.
- ZIPAIR: Currently operating 3 flights a week from Narita.

Distribution by Island

JAPAN MMA (by Air)	2019	2020	2021	YTD Sep. 2022P	YTD Sep. 2021	% Change YTD
O'ahu	1,492,753	269,402	18,001	106,833	11,907	797.2%
Maui County	48,524	8,265	775	3,526	422	735.9%
Maui	46,684	7,929	766	3,307	418	691.8%
Moloka'i	1,941	416	16	111	14	684.1%
Lāna'i	2,300	128	19	266	13	1970.4%
Kaua'i	25,333	3,622	361	1,882	196	862.6%
Island of Hawai'i	170,686	35,453	1,000	9,463	418	2166.3%

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	159,082	311,741	586,372	30,717	24,354	32,490	44,205	131,766	66.8	164.0	389.6	605.2	345.0
Fukuoka	0	0	0	10,008	10,008	0	0	0	0	0	0	0	0	NA	NA
Nagoya	0	0	2,587	9,001	11,588	0	0	0	186	186	0	0	NA	4739.2	6130.1
Osaka	3,809	3,614	21,614	43,644	72,681	5,004	3,614	3,892	3,614	16,124	-23.9	0.0	455.3	1107.6	350.8
Sapporo	0	0	0	7,506	7,506	0	0	0	0	0	0	0	0	NA	NA
Tokyo HND	14,946	20,530	67,273	120,653	223,402	12,500	9,620	11,520	12,876	46,516	19.6	113.4	484.0	837.0	380.3
Tokyo NRT	32,488	40,162	67,608	120,929	261,187	13,213	11,120	17,078	27,529	68,940	145.9	261.2	295.9	339.3	278.9

Source: DBEDT analysis based on scheduled seats from Diio Mi flight schedules as of September 22, 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	631	1,143	2,287	118	102	128	181	529	100.0	171.6	393.0	531.5	332.3
Fukuoka	0	0	0	36	36	0	0	0	0	0	0	0	0	NA	NA
Nagoya	0	0	13	39	52	0	0	0	1	1	0	0	NA	3800.0	5100.0
Osaka	14	13	84	154	265	18	13	14	13	58	-22.2	0.0	500.0	1084.6	356.9
Sapporo	0	0	0	27	27	0	0	0	0	0	0	0	0	NA	NA
Tokyo HND	70	98	286	481	935	53	49	55	63	220	32.1	100.0	420.0	663.5	325.0
Tokyo NRT	152	166	248	406	972	47	40	59	104	250	223.4	315.0	320.3	290.4	288.8

Source: DBEDT analysis based on scheduled flights from Diio Mi flight schedules as of September 22, 2022, subject to change.

Group vs. True Independent; Leisure vs. Business

JAPAN MMA (by Air)	2019	2020	2021	YTD Sep. 2022P	YTD Sep. 2021	% Change YTD
Group vs True Independent (Net)						
Group Tour	246,490	NA	203.8	6,074	98	6109.4%
True Independent (Net)	594,917	NA	18,155.3	87,972	12,084	628.0%
Leisure vs Business						
Pleasure (Net)	1,360,644	247,980	13,254	92,406	8,838	945.5%
MCI (Net)	85,595	18,464	563	4,206	317	1225.0%
Convention/Conf.	12,527	3,983	135	1,366	50	2613.1%
Corp. Meetings	4,068	951	368	605	236	155.9%
Incentive	70,254	13,922	75	2,470	31	7964.0%

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 Sep. 2022P	YTD Sep. 2021	% Change YTD
First Time Visitors (%)	31.7	NA	14.2	20.5	14.7	5.8
Repeat Visitors (%)	68.3	NA	85.8	79.5	85.3	-5.8

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	YTD Sep. 2022P	YTD Sep. 2021	% Change YTD
State tax revenue generated (\$ Millions) ^{2/}	262.43	NA	7.60	26.10	5.28	393.9%

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