



## 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 Hawaii'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 Travel 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 March 2021 Quick Facts<sup>1/</sup>

Visitor Expenditures: \$10.9 million  
 Primary Purpose of Stay: Pleasure (1,834) vs. MCI (111)  
 Average Length of Stay: 18.28 days  
 First Time Visitors: 19.0%  
 Repeat Visitors: 81.0%

	2019	2020	% Change 2020 vs 2019	2021 Annual Forecast <sup>2/</sup>	YTD Mar. 2021P	YTD Mar. 2020P	% change YTD
JAPAN MMA (by Air)							
Visitor Expenditures (\$ Millions) *	2,248.3	415.7*	NA	454.4	10.9	415.7	-97.4%
Visitor Days	9,306,767	1,785,502	-80.8%	1,998,302	53,183	1,729,323	-96.9%
Arrivals	1,576,205	297,243	-81.1%	347,802	2,910	294,228	-99.0%
Average Daily Census	25,498	4,878	-80.9%	5,475	591	19,004	-96.9%
Per Person Per Day Spending (\$) *	241.6	240.4*	NA	227.4	205.8	240.4	-14.4%
Per Person Per Trip Spending (\$) *	1,426.4	1,413.0*	NA	1,306.4	3,761.9	1,413.0	166.2%
Length of Stay (days)	5.90	6.01	1.7%	5.75	18.28	5.88	211.0%

<sup>1/</sup> 2020 visitor spending data were only available for January – March 2020. Data for other months were not available due to limited samples.

<sup>2/</sup> Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 1, 2021).

### Contact Information

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<sup>1/</sup> 2021 and 2020 visitor data are preliminary. 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

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During March 2021, most passengers arriving from out-of-state and traveling inter-county could bypass the State's mandatory 10-day self-quarantine with a valid negative COVID-19 NAAT test result from a Trusted Testing Partner through the state's Safe Travels program. 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. Kaua'i County continued to temporarily suspend its participation in the state's Safe Travels program, making it mandatory for all trans-Pacific travelers to Kaua'i to quarantine upon arrival except for those participating in a pre- and post-travel testing program at a "resort bubble" property as a way to shorten their time in quarantine. The counties of Hawai'i, Maui and Kalawao (Moloka'i) also had a partial quarantine in place in March. In addition, the U.S. Centers for Disease Control and Prevention (CDC) continued to enforce the "Conditional Sailing Order" on all cruise ships.

In March, the Japan government required proof of a negative PCR test for all entry into Japan. In addition, all travelers, including returning Japanese nationals were required to quarantine for 14 days.

- In the first quarter of 2021, Japanese visitors spent \$10.9 million (-97.4%), and their average daily spending was \$206 per person (-14.4%). There were 2,910 visitors from Japan compared to 294,228 visitors in the same period last year. The average daily census showed 591 visitors per day compared to 19,004 visitor per day in the first quarter of 2020.
- In the first quarter of 2021, there were 118 (-93.1%) scheduled flights from Japan, with 30,717 (-93.4%) seats. Nearly all flights were postponed except for limited service from Osaka (5,004 seats, -94.6%), Tokyo-Narita (13,213, -94.8%) and Tokyo-Haneda (12,500, -79.4%).
- 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

- Japan's economy expanded more than expected in Quarter 4, 2020 based on government data. According to private research institutes, 2021 GDP predicted to grow 3.9 percent compared to the previous year. Due to the 2<sup>nd</sup> state of emergency, consumption decreased in Quarter 1, 2021. However, many economists are optimistic for recovery starting Quarter 2. Twelve private think-tank forecasted 2021 real GDP growth between 5.1 percent and 3.3 percent.
- Japan government lifted the 2<sup>nd</sup> state of emergency from rest of 4 Tokyo metro prefectures (Tokyo, Kanagawa, Chiba and Saitama) on March 21, 2021. However, the government has regulated business activities to monitor the current condition of COVID-19 surge.
- Starting February 17, 2021, Japan launched its COVID-19 inoculation drive administering the vaccine to hospital workers, as Prime Minister Suga attempts to beat the odds and host the Olympics this summer. Japan is in the process of vaccinating 4.8 million healthcare workers and plans to expand the vaccine rollout to people aged 65 or older, a group of about 36 million, in mid-April.
- Japan government announced operating Tokyo Olympic with no foreign spectators allowed and these conditions accepted by IOC as well. Under the conditions, the government continues foreign entry restriction, travel advise level 2, suspension of Business and Residence track until further notice.
- Japan National Tourism Organization (JNTO) announced Japanese outbound for February 2021 as 24,807 passengers (-98.1% vs 2020). Since April 2020, the number of outbound travelers has declined around 90 percent consecutively in the last 11 months.
- Airline Operation: Total 30 flights with 7,684 air seats to Hawai'i in March 2021 by ANA, Hawaiian and JAL. April 2021 forecast: 35 flights with 8,798 seats. May 2021 forecast: 34 flights with 8,428 seats.
- Pre-clearance: Hawaiian Airlines (HA) (Narita & Kansai flights) and Japan Airlines (JAL) (Haneda flights) started Pre-Clearance service from March. If their passengers are able to submit the Hawai'i's pre-testing requirements, their arrival experience at Honolulu Airport will be faster and smoother. HA started from 3/16 for Narita, 3/18 for Kansai. JAL started from 3/26.
- Airline Suspension: Delta (until 7/1); United (until 6/3); Korean (Until 5/31).

## Distribution by Island

JAPAN MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Mar. 2021P	YTD Mar. 2020P	% change YTD
O'ahu	1,492,753	277,354	-81.4%	2,812	274,520	-99.0%
Maui County	48,524	8,551	-82.4%	60	8,471	-99.3%
Maui	46,684	8,212	-82.4%	60	8,132	-99.3%
Moloka'i	1,941	421	-78.3%	3	421	-99.2%
Lāna'i	2,300	133	-94.2%	2	133	-98.2%
Kaua'i	25,333	3,723	-85.3%	15	3,699	-99.6%
Island of Hawai'i	170,686	36,014	-78.9%	94	35,893	-99.7%

## Airlift

Departure City	2021					2020					%CHANGE				
	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual	Q1	Q2	Q3	Q4	Annual
JAPAN	30,654	156,568	496,011	504,188	1,187,421	465,328	744	930	16,572	483,574	-93.4	20,944.1	53,234.5	2,942.4	145.6
Fukuoka	0	4,726	14,456	14,456	33,638	13,622	0	0	0	13,622	-100.0	NA	NA	NA	146.9
Nagoya	0	7,170	21,988	21,988	51,146	32,280	0	0	0	32,280	-100.0	NA	NA	NA	58.4
Osaka	5,004	29,044	77,347	82,248	193,643	92,526	0	0	1,390	93,916	-94.6	NA	NA	5,817.1	106.2
Sapporo	0	2,502	7,228	10,008	19,738	10,008	0	0	0	10,008	-100.0	NA	NA	NA	97.2
Tokyo HND	12,500	47,712	163,902	164,128	388,242	60,685	744	930	5,362	67,721	-79.4	6,312.9	17,523.9	2,961.0	473.3
Tokyo NRT	13,150	65,414	211,090	211,360	501,014	256,207	0	0	9,820	266,027	-94.9	NA	NA	2,052.3	88.3

Source: HTA analysis based on scheduled Seats from Diiro Mi flight schedules as of March 18, 2021, subject to change.

## Group vs. True Independent; Leisure vs. Business

JAPAN MMA (by Air)	2019	2020P <sup>3/</sup>	% Change 2020 vs 2019	YTD Mar. 2021P <sup>3/</sup>	YTD Mar. 2020	% change YTD
Group vs True Independent (Net)						
Group tour	246,490	50,668	-79.4%	50	50,657	-99.9%
True Independent (Net)	594,917	115,650	-80.6%	2,745	113,287	-97.6%
Leisure vs business						
Pleasure (Net)	1,360,644	254,875	-81.3%	1,834	253,189	-99.3%
MCI (Net)	85,595	19,382	-77.4%	111	19,311	-99.4%
Convention/Conf.	12,527	3,980	-68.2%	23	3,948	-99.4%
Corp. Meetings	4,068	930	-77.1%	71	879	-91.9%
Incentive	70,254	14,855	-78.9%	17	14,852	-99.9%

<sup>3/</sup> 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)	2019	2020P <sup>3/</sup>	% Change 2020 vs 2019	YTD Mar. 2021P <sup>3/</sup>	YTD Mar. 2020	% change YTD
1st timers (%)	31.7	32.2	0.5	19.0	31.9	-12.9
Repeaters (%)	68.3	67.8	-0.5	81.0	68.1	12.9

<sup>3/</sup> Note: Beginning August 2020, certain categories reflect only domestic data (italicized) as international data were not available.

## Tax Revenue

JAPAN MMA (by Air)	2019	2020P	% Change 2020 vs 2019	YTD Mar. 2021P	YTD Mar. 2020	% change YTD
State tax revenue generated (\$ Millions) <sup>4/</sup>	262.43	48.53*	NA	1.28	48.53	-97.4%

<sup>4/</sup> State government tax revenue generated (direct, indirect, and induced)

\* 2020 State tax revenue generated were calculated based on available visitor spending data for January – March 2020.