



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 August Quick Facts^{1/}

Visitor Expenditures:	\$48.4 million
Primary Purpose of Stay:	Pleasure (9,400) vs. MCI (346)
Average Length of Stay:	17.05 days
First Time Visitors:	16.6%
Repeat Visitors:	83.4%

JAPAN MMA (by Air)	2019	2020*	% Change 2020 vs 2019	2021 Annual Forecast ^{1/}	YTD Aug. 2021	YTD Aug. 2020	% Change YTD
Visitor Expenditures (\$ Millions)	2,248.3	NA	NA	203.1	48.4	NA	NA
Visitor Days	9,306,767	1,719,843	-81.5%	842,321	226,279	1,686,320	-86.6%
Arrivals	1,576,205	289,137	-81.7%	146,008	13,271	286,716	-95.4%
Average Daily Census	25,498	4,699	-81.6%	2,308	931	6,911	-86.5%
Per Person Per Day Spending (\$)	241.6	NA	NA	241.1	213.9	NA	NA
Per Person Per Trip Spending (\$)	1,426.4	NA	NA	1,390.8	3,647.8	NA	NA
Length of Stay (days)	5.90	5.95	0.7%	5.77	17.05	5.88	189.9%

^{1/}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 August 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. On August 23, 2021, Hawai'i Governor David Ige urged travelers to curtail non-essential travel until the end of October 2021 due to a surge in Delta variant cases that has overburdened the state's health care facilities and resources. 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.

In August 2021, 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.

- Through the first eight months of 2021, there were 13,271 visitors from Japan compared to 286,716 visitors (-95.4%) in the first eight months of 2020, versus 1,029,549 visitors (-98.7%) in the first eight months of 2019.
- For the first eight months of 2021, total visitor spending was \$48.4 million, a 96.7 percent decrease from \$1.46 billion in the first eight months of 2019. Comparative 2020 spending data was not available.
- Through the first eight months of 2021, there were 302 scheduled flights with 75,911 seats from Japan. In comparison, there were 1,719 flights with 466,630 seats in the first eight months of 2020, versus 5,195 flights with 1,326,446 seats in the first eight months of 2019.
- Comparing the first eight months of 2021 vs. the first eight months of 2020, nearly all flights were postponed except for limited service from Osaka (11,120 seats, -88.0%), Tokyo-Haneda (29,894 -51.8%) and Tokyo-Narita (34,897, -86.4%).
- 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

- Economy: Japan grew an annualized 1.3 percent in April-June after a revised 3.7 percent slump in the first quarter, preliminary gross domestic product data showed, beating a median market forecast for a 0.7 percent gain.
- Consumption: +0.8 percent in April-June from the previous quarter.
- Capital expenditure: +1.7 percent. (Domestic demand contributed 0.6% point to GDP growth).
- Exports: +2.9 percent in April-June from the previous quarter.
- Extension of State of Emergency: The current the state of emergency was extended until September 30. With 6 additional prefectures, total 19 prefectures including Metro Tokyo and Osaka area were under the state of emergency.
- Vaccination: As of September 13, 79.8 million people (63%) are vaccinated once, and 64.4 million people (50.9%) are fully vaccinated. It is predicted that by end of September, 60 percent of the population will be fully vaccinated.
- Vaccine Passport: Japan's Vaccine Certificate (VC) program for oversea travelers started from July 26 and by end of August, about 33 countries/regions have accepted the Japan issued VC. Japan will issue online COVID-19 vaccination certificates from December.
- Japan Overseas Travel: According to Japan National Tourism Organization (JNTO), Japanese outbound travel for August 2021 was 66,100 passengers (-96.9% vs 2019).
- Airlift: In August, there are a total of 43 flights (11,214 air seats) from Japan to Hawai'i. In September, there will be 41 flights with 10,572 air seats. From October, ZIPAIR will add one more flight and Japan Airlines will operate two additional flights. There will be 43 flights (10,518 air seats) in October.

Distribution by Island

JAPAN MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Aug. 2021	YTD Aug. 2020	% change YTD
O'ahu	1,492,753	269,402	-82.0%	12,750	267,123	-95.2%
Maui County	48,524	8,265	-83.0%	386	8,193	-95.3%
Maui	46,684	7,929	-83.0%	383	7,857	-95.1%
Moloka'i	1,941	416	-78.6%	14	416	-96.7%
Lāna'i	2,300	128	-94.4%	10	128	-92.3%
Kaua'i	25,333	3,622	-85.7%	166	3,610	-95.4%
Island of Hawai'i	170,686	35,453	-79.2%	430	35,355	-98.8%

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	411,244	505,887	465,328	744	930	16,572	483,574	-93.4	3,173.4	4,155.1	2,381.6	4.6
Fukuoka	0	0	0	14,456	14,456	13,622	0	0	0	13,622	-100.0	NA	NA	NA	6.1
Nagoya	0	0	0	21,988	21,988	32,280	0	0	0	32,280	-100.0	NA	NA	NA	-31.9
Osaka	5,004	3,614	3,892	47,286	59,796	92,526	0	0	1,390	93,916	-94.6	NA	NA	3,301.9	-36.3
Sapporo	0	0	0	9,730	9,730	10,008	0	0	0	10,008	-100.0	NA	NA	NA	-2.8
Tokyo HND	12,500	9,620	11,892	151,070	185,082	60,685	744	930	5,362	67,721	-79.4	1,193.0	1,178.7	2,717.4	173.3
Tokyo NRT	13,213	11,120	23,788	166,714	214,835	256,207	0	0	9,820	266,027	-94.8	NA	NA	1,597.7	-19.2

Source: DBEDT analysis based on scheduled Seats from Diao Mi flight schedules as of July 26, 2021, subject to change.

Group vs. True Independent; Leisure vs. Business

JAPAN MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Aug. 2021	YTD Aug. 2020	% change YTD
Group vs True Independent (Net)						
Group tour	246,490	NA	NA	129	NA	NA
True Independent (Net)	594,917	NA	NA	12,796	NA	NA
Leisure vs business						
Pleasure (Net)	1,360,644	247,980	-81.8%	9,400	246,458	-96.2%
MCI (Net)	85,595	18,464	-78.4%	346	18,407	-98.1%
Convention/Conf.	12,527	3,983	-68.2%	52	3,953	-98.7%
Corp. Meetings	4,068	951	-76.6%	255	911	-72.0%
Incentive	70,254	13,922	-80.2%	40	13,921	-99.7%

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 Aug. 2021	YTD Aug. 2020	% change YTD
1st timers (%)	31.7	NA	NA	16.6	NA	NA
Repeaters (%)	68.3	NA	NA	83.4	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 Aug. 2021	YTD Aug. 2020	% change YTD
State tax revenue generated (\$ Millions) ^{2/}	262.43	NA	NA	5.65	NA	NA

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