



# 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 September 2021 Quick Facts<sup>1/</sup>

Visitor Expenditures: \$54.6 million  
 Primary Purpose of Stay: Pleasure (10,677) vs. MCI (379)  
 Average Length of Stay: 16.79 days  
 First Time Visitors: 15.4%  
 Repeat Visitors: 84.6%

JAPAN MMA (by Air)	2019	2020*	% Change 2020 vs 2019	2021 Annual Forecast <sup>1/</sup>	YTD Sep. 2021	YTD Sep. 2020	% Change YTD
Visitor Expenditures (\$ Millions)	2,248.3	NA	NA	74.2	54.6	NA	NA
Visitor Days	9,306,767	1,719,843	-81.5%	341,119	252,515	1,688,088	-85.0%
Arrivals	1,576,205	289,137	-81.7%	20,633	15,040	286,802	-94.8%
Average Daily Census	25,498	4,699	-81.6%	935	925	6,161	-85.0%
Per Person Per Day Spending (\$)	241.6	NA	NA	217.4	216.2	NA	NA
Per Person Per Trip Spending (\$)	1,426.4	NA	NA	3,594.3	3,629.3	NA	NA
Length of Stay (days)	5.90	5.95	0.7%	16.53	16.79	5.89	185.3%

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.

<sup>1/</sup>Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 3, 2021).

## Contact Information

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<sup>1/</sup> 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

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In September 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 September 2021, The Japanese government required proof of a negative PCR test within 72 hours for all entry into Japan. All travelers, including Japanese nationals returning to Japan were required to quarantine for 14 days.

- Through the first nine months of 2021, there were 15,040 visitors from Japan compared to 286,802 visitors (-94.8%) in the first nine months of 2020, versus 1,173,477 visitors (-98.7%) in the first nine months of 2019.
- For the first nine months of 2021, total visitor spending was \$54.6 million, a 96.7 percent drop from \$1.65 billion in the first nine months of 2019. Comparative 2020 spending data was not available.
- Through the first nine months of 2021, there were 348 scheduled flights with 87,561 seats from Japan. In comparison, there were 1,721 flights with 467,002 seats in the first nine months of 2020, versus 5,836 flights with 1,498,414 seats in the first nine months of 2019.
- Comparing the first nine months of 2021 vs. the first nine months of 2020, nearly all flights were postponed except for limited service from Osaka (12,510 seats, -86.5%), Tokyo-Haneda (33,640 -46.1%) and Tokyo-Narita (41,411, -83.8%).
- 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

- **New Prime Minister Elected:** New Prime Minister Fumio Kishida elected and formed a Cabinet to meet challenges including recovering an economy affected by the pandemic and prevention of COVID-19 spread. Prime Minister Kishida made first speech to transform the Japanese economy by implementing a “new model of capitalism,” identifying growth and the distribution of wealth as “mutually necessary.”
- **Economic Recovery:** With relaxation of COVID-19 regulation, slowly the government plans economic recovery by setting up ¥500 billion fund aimed at supporting firms developing vaccines for infectious diseases and new drugs and expands “university fund” by ¥600 billion to enhance research activities and make Japan a nation of science and technology.
- **COVID-19 New Infection & Vaccination:** The number of new COVID-19 cases confirmed each day in Japan is continuing to fall, even after the full lifting of the government’s state of emergency at the end of September 2021, according to the health ministry advisory board. As of October 18, 95.6 million people (75.5%) are vaccinated once, and 85.3 million people (67.4%) are fully vaccinated.
- **Vaccine Passport:** Japan’s Vaccine Certificate (VC) program for oversea travelers started from July 26 and as of mid-October, about 51 countries/regions have accepted the Japan issued VC. Japan is planning to introduce online COVID-19 vaccination certificates from December.
- **Shorten Quarantine Requirement:** The Japan Government announced that as of October 1, self-quarantine for fully vaccinated travelers is reduced from 14 days to 10 days.
- **Japan Overseas Travel:** Based on Japan National Tourism Organization (JNTO) report, Japanese outbound travel for September 2021 was 52,400 passengers (-97.0% vs 2019).
- **Airlift:** Four airlines (ANA, Hawaiian, JAL and ZIPAIR) operated 48 direct flights (12,020 air seats) to Honolulu in October. JAL will operate 1 flight each from Kansai (KIX) and Nagoya (NGO) at the end of December. It will be a total 52 flights (13,180 air seats) in November and 56 flights (13,568 air seats) in December.

## Distribution by Island

JAPAN MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Sep. 2021	YTD Sep. 2020	% change YTD
O'ahu	1,492,753	269,402	-82.0%	14,433	267,206	-94.6%
Maui County	48,524	8,265	-83.0%	451	8,194	-94.5%
Maui	46,684	7,929	-83.0%	446	7,858	-94.3%
Moloka'i	1,941	416	-78.6%	15	416	-96.4%
Lāna'i	2,300	128	-94.4%	13	128	-89.8%
Kaua'i	25,333	3,622	-85.7%	203	3,610	-94.4%
Island of Hawai'i	170,686	35,453	-79.2%	486	35,357	-98.6%

## 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 Sep. 2021	YTD Sep. 2020	% change YTD
Group vs True Independent (Net)						
Group tour	246,490	NA	NA	142	NA	NA
True Independent (Net)	594,917	NA	NA	14,465	NA	NA
Leisure vs business						
Pleasure (Net)	1,360,644	247,980	-81.8%	10,677	246,473	-95.7%
MCI (Net)	85,595	18,464	-78.4%	379	18,407	-97.9%
Convention/Conf.	12,527	3,983	-68.2%	58	3,953	-98.5%
Corp. Meetings	4,068	951	-76.6%	284	911	-68.9%
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 Sep. 2021	YTD Sep. 2020	% change YTD
1st timers (%)	31.7	NA	NA	15.4	NA	NA
Repeaters (%)	68.3	NA	NA	84.6	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 Sep. 2021	YTD Sep. 2020	% change YTD
State tax revenue generated (\$ Millions) <sup>2/</sup>	262.43	NA	NA	6.37	NA	NA

<sup>2/</sup>State government tax revenue generated (direct, indirect, and induced).