



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 December 2021 Quick Facts^{1/}

Visitor Expenditures: \$82.9 million
 Primary Purpose of Stay: Pleasure (16,915) vs. MCI (680)
 Average Length of Stay: 15.62 days
 First Time Visitors: 15.3%
 Repeat Visitors: 84.7%

	2019	2020	% Change 2020 vs 2019	2021 Annual Forecast ^{1/}	YTD Dec. 2021	YTD Dec. 2020	% Change YTD
JAPAN MMA (by Air)							
Visitor Expenditures (\$ Millions)	2,248.3	NA	NA	83.1	82.9	NA	NA
Visitor Days	9,306,767	1,719,843	-81.5%	382,433	378,558	1,719,843	-78.0%
Arrivals	1,576,205	289,137	-81.7%	23,527	24,232	289,137	-91.6%
Average Daily Census	25,498	4,699	-81.6%	1,048	1,037	4,699	-77.9%
Per Person Per Day Spending (\$)	241.6	NA	NA	217.2	218.9	NA	NA
Per Person Per Trip Spending (\$)	1,426.4	NA	NA	3,530.9	3,419.5	NA	NA
Length of Stay (days)	5.90	5.95	0.7%	16.26	15.62	5.95	162.6%

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.

^{1/}Dept. of Business, Economic Development & Tourism (DBEDT) 2021 annual forecast (Quarter 4, 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 December 2021, domestic passengers 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. Beginning December 6, passengers arriving on direct international flights were subjected to federal U.S. entry requirements which included proof of a negative COVID-19 viral test result taken within 24 hours of travel or documentation of having recovered from COVID-19 in the past 90 days, prior to their flight. 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 December 2021, the Japan government strengthened quarantine measures in response to the rapid expansion of the Omicron variant. Entry ban for most foreign nationals was in place through December 31, 2021. Travelers permitted to enter Japan, including returning resident, were required to present a negative PCR test taken within 72 hours of arrival and quarantine for 14 days. Travelers from destinations defined as high-risk by the Japan government were required to undergo institutional quarantine for 3, 6, or 10 days, show a test negative PCR test before they can exit the facility, then self-quarantine for 14 days.

- For all of 2021, 24,232 visitors arrived from Japan, of which 21,820 visitors came on international flights and 2,412 visitors came on domestic flights. In comparison, there were 289,137 visitors (-91.6%) from Japan in 2020, versus 1,576,205 visitors (-98.5%) in 2019.
- Total visitor spending in 2021 was \$82.9 million, a 96.3 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, versus 7,696 flights with 1,999,204 seats in 2019.
- Comparing 2021 vs. 2020, flights from Fukuoka and Sapporo were suspended and there was limited service from Osaka (16,124 seats, -82.8%), Tokyo-Haneda (46,516 -31.3%) and Tokyo-Narita (68,940, -74.1%).
- In 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.
- In 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

- Fiscal 2022 (April 2022 to March 2023) Budget: The government is compiling a draft budget for fiscal 2022 amounting to 107.6 trillion (\$950 billion) including \$5 trillion of COVID19 virus reserve funds. The fiscal 2022 budget is a record high for the 10th straight year.
- GDP: The government upgraded its forecast for the domestic economy growth in fiscal 2022 to 3.2 percent, higher than previous estimation of 2.2 percent. It's expected the pace of recovery from the slump due to pandemic will pick up and improve within the current year.
- Restriction & Vaccination: Due to the emerge of Omicron variant, Japan government announced additional restrictions in November with limited arrivals per day from 5,000 pax to 2,500 starting on December 5, 2021. As of December 31, 2021, 100.1 million (79.1%) Japanese are vaccinated once, and 98.3 million (77.6%) are fully vaccinated.
- Digital Vaccine Certificate: The government started a digital version of COVID19 vaccination certificate on December 20. The digital vaccine certificate will be used mainly for immigration/oversea travel purposes. The certificate includes information of user's name, DOB, type of vaccine and dates of vaccination.
- Japan Outbound Travel: According to Japan National Tourism Organization (JNTO), Japanese outbound for December 2021 was 48,900 travelers (-97.1% vs 2019). For 2021 overall, 512,200 oversea travelers from Japan were recorded (-97.4% vs 2019).
- Airlift: There was a total of 80 flights (19,813 seats) in December from Japan to Hawai'i. As of December 2021, 80 flights (20,932 seats) in January and 81 flights (19,320 seats) in February are forecasted.

Distribution by Island

JAPAN MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Dec. 2021	YTD Dec. 2020	% change YTD
O'ahu	1,492,753	269,402	-82.0%	23,130	269,402	-91.4%
Maui County	48,524	8,265	-83.0%	912	8,265	-89.0%
Maui	46,684	7,929	-83.0%	902	7,929	-88.6%
Moloka'i	1,941	416	-78.6%	17	416	-96.0%
Lāna'i	2,300	128	-94.4%	20	128	-84.5%
Kaua'i	25,333	3,622	-85.7%	424	3,622	-88.3%
Island of Hawai'i	170,686	35,453	-79.2%	1,360	35,453	-96.2%

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	32,490	44,205	131,766	465,328	744	930	16,572	483,574	-93.4	3173.4	3393.5	166.7	-72.8
Fukuoka	0	0	0	0	0	13622	0	0	0	13,622	-100.0	0	0	0	-100.0
Nagoya	0	0	0	186	186	32280	0	0	0	32280	-100.0	0	0	NA	-99.4
Osaka	5,004	3,614	3,892	3,614	16,124	92,526	0	0	1,390	93,916	-94.6	NA	NA	160.0	-82.8
Sapporo	0	0	0	0	0	10008	0	0	0	10,008	-100.0	0	0	0	-100.0
Tokyo HND	12,500	9,620	11,520	12,876	46,516	60,685	744	930	5,362	67,721	-79.4	1193.0	1138.7	140.1	-31.3
Tokyo NRT	13,213	11,120	17,078	27,529	68,940	256,207	0	0	9,820	266,027	-94.8	NA	NA	180.3	-74.1

Source: DBEDT analysis based on scheduled Seats from DiiO Mi flight schedules as of January 14, 2022, subject to change.

Group vs. True Independent; Leisure vs. Business

JAPAN MMA (by Air)	2019	2020	% Change 2020 vs 2019	YTD Dec. 2021	YTD Dec. 2020	% change YTD
Group vs True Independent (Net)						
Group tour	246,490	NA	NA	292	NA	NA
True Independent (Net)	594,917	NA	NA	23,087	NA	NA
Leisure vs business						
Pleasure (Net)	1,360,644	247,980	-81.8%	16,915	247,980	-93.2%
MCI (Net)	85,595	18,464	-78.4%	680	18,464	-96.3%
Convention/Conf.	12,527	3,983	-68.2%	175	3,983	-95.6%
Corp. Meetings	4,068	951	-76.6%	451	951	-52.6%
Incentive	70,254	13,922	-80.2%	75	13,922	-99.5%

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	% Change 2020 vs 2019	YTD Dec. 2021	YTD Dec. 2020	% change YTD
1st timers (%)	31.7	NA	NA	15.3	NA	NA
Repeaters (%)	68.3	NA	NA	84.7	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 Dec. 2021	YTD Dec. 2020	% change YTD
State tax revenue generated (\$ Millions) ^{2/}	262.43	NA	NA	9.67	NA	NA

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