



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 March 2022 Quick Facts^{1/}

Visitor Expenditures: \$31.5 million
Primary Purpose of Stay: Pleasure (5,771) vs. MCI (527)
Average Length of Stay: 16.14 days
First Time Visitors: 16.0%
Repeat Visitors: 84.0%

	2019	2020	2021P	2022 Annual Forecast*	YTD Mar. 2022P	YTD Mar. 2021P	% Change YTD
JAPAN MMA (by Air)							
Visitor Expenditures (\$ Millions)	2,248.3	NA	82.9	805.1	31.5	10.9	187.7%
Visitor Days	9,306,767	1,719,843	378,558	3,167,750	146,352	53,183	175.2%
Arrivals	1,576,205	289,137	24,232	521,380	9,068	2,910	211.6%
Average Daily Census	25,498	4,699	1,037	8,679	1,626	591	175.2%
Per Person Per Day Spending (\$)	241.6	NA	218.9	254.2	215.2	205.8	4.5%
Per Person Per Trip Spending (\$)	1,426.4	NA	3,419.5	1,544.3	3,472.4	3,761.9	-7.7%
Length of Stay (days)	5.90	5.95	15.62	6.08	16.14	18.28	-11.7%

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 1, 2022).

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^{1/} 2022 and 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

Prior to the global COVID-19 pandemic and Hawai'i's quarantine requirements for travelers, the State of Hawai'i achieved record-level visitor expenditures and arrivals in 2019 through February 2020. Due to concerns about the rapid surge of COVID cases worldwide and the limitations of Hawai'i's health care system, on March 17, 2020 Hawai'i Gov. David Ige asked visitors to postpone their trips for at least 30 days. The counties also began issuing stay-at-home orders. On March 26, 2020, the state implemented a 14-day mandatory travel quarantine. Subsequently, nearly all trans-Pacific and interisland flights were canceled, cruise ship activities were suspended and tourism to the islands all but shut down. This continued until mid-October 2020, when the state initiated the Safe Travels program, which allowed trans-Pacific travelers to bypass the quarantine if they had a valid negative test for COVID-19.

Through March 25, 2022, domestic passengers could bypass the State's mandatory five-day self-quarantine if they were up-to-date on their vaccination or with a negative COVID-19 pre-travel test result from a Trusted Testing Partner through the Safe Travels program. The Safe Travels Program ended on March 25, 2022, and domestic pre-travel requirements ceased as of March 26, 2022. Passengers arriving on direct international flights were subjected to federal U.S. entry requirements which included proof of an up-to-date vaccination document and negative COVID-19 test result taken within one day of travel, or documentation of having recovered from COVID-19 in the past 90 days, prior to their flight.

- Through the first quarter of 2022, there were 9,068 visitors from Japan, compared 374,929 visitors (-97.6%) in the first quarter of 2019.
- Visitors from Japan spent \$31.5 million in the first quarter of 2022, compared to \$524.1 billion (-94.0%) in the first quarter of 2019.
- There were 236 scheduled flights with 51,243 seats in the first quarter of 2022, compared to 2,022 flights with 505,898 seats in the first quarter of 2019.
- For all of 2021, 24,232 visitors arrived from Japan. In comparison, there were 289,137 visitors (-91.6%) from Japan in 2020, and 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, and 7,696 flights with 1,999,204 seats in 2019.

Market Conditions

- The Japanese Yen fell sharply in March 2022, hitting a near seven-year low of 122.0 per USD at the close of trading on March 25, and it is predicted to continue falling in the short term.
- Japanese economic trend continued to show a positive movement in goods consumption. In the first half of March 2022, consumption increased 1.1 percent compared to pre-COVID. GDP growth for 2022 is projected at 2.1 percent. Go-To-Travel is now under reconsideration starting after the Golden Week holiday in May 2022.

- Consumer Confidence Index in March 2022 reached the highest in the past 5 years. In total 16 categories, “Travel” has increased compared to the previous months. Consumers are consciously planning for long-distance travel.
- On April 1, 2022, the Ministry of Foreign Affairs of Japan (MOFA) eased travel advice from Level 3 “Avoid All Travel”, to Level 2 “Avoid Non-essential Travel” for 106 countries, including the U.S. From April 10, Japan will increase its daily new entry capacity up to 10,000 passengers.
- As of April 8, 44.3 percent of Japanese has completed the booster shot and 79.6 percent are fully vaccinated.
- According to JNTO, the number of outbound travelers in February 2022 was 46,900. This is a 90 percent increase compared to the same month of 2021, but a 96.9 percent decrease compared to the same month of 2019.
- Hawai'i is the most popular travel destinations for Millennials: VALISE marketing company run SNS survey on its Instagram to see the travel demands for Golden Week holiday. As result, 30 percent answered that they already have a plan for travel, and 49 percent said it is a self-treat trip. Only 10 percent is planning international travel and Hawai'i is one of the top destinations besides Europe. Millennials tends to have specific travel purpose for their trip.
- In March 2022, four airlines (ANA, Hawaiian, JAL, and ZIPAIR) operated a total of 82 flights with 17,231 seats to Honolulu.

Distribution by Island

JAPAN MMA (by Air)	2019	2020	2021P	YTD Mar. 2022P	YTD Mar. 2021P	% change YTD
O'ahu	1,492,753	269,402	23,130	8,471	2,812	201.2%
Maui County	48,524	8,265	912	631	60	956.7%
Maui	46,684	7,929	902	612	60	925.4%
Moloka'i	1,941	416	17	1	3	-67.9%
Lāna'i	2,300	128	20	20	2	705.0%
Kaua'i	25,333	3,622	424	208	15	1303.9%
Island of Hawai'i	170,686	35,453	1,360	944	94	906.9%

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	72,941	424,653	461,960	1,010,797	30,717	24,354	32,490	44,205	131,766	66.8	199.5	1207.0	945.0	667.1
Fukuoka	0	0	14178	14734	28,912	0	0	0	0	0	NA	NA	NA	NA	NA
Nagoya	0	0	14579	21988	36,567	0	0	0	186	186	NA	NA	NA	11721.5	19559.7
Osaka	3,809	4,726	40,474	47,564	96,573	5,004	3,614	3,892	3,614	16,124	-23.9	30.8	939.9	1216.1	498.9
Sapporo	0	0	10842	10842	21,684	0	0	0	0	0	NA	NA	NA	NA	NA
Tokyo HND	14,946	18,781	135,794	157,574	327,095	12,500	9,620	11,520	12,876	46,516	19.6	95.2	1078.8	1123.8	603.2
Tokyo NRT	32,488	49,434	208,786	209,258	499,966	13,213	11,120	17,078	27,529	68,940	145.9	344.6	1122.5	660.1	625.2

Source: DBEDT analysis based on scheduled seats from Diio Mi flight schedules as of April 26, 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	307	1,505	1,667	3,715	118	102	128	181	529	100.0	201.0	1075.8	821.0	602.3
Fukuoka	0	0	51	53	104	0	0	0	0	0	NA	NA	NA	NA	NA
Nagoya	0	0	61	92	153	0	0	0	1	1	NA	NA	NA	9100.0	15200.0
Osaka	14	17	155	184	370	18	13	14	13	58	-22.2	30.8	1007.1	1315.4	537.9
Sapporo	0	0	39	39	78	0	0	0	0	0	NA	NA	NA	NA	NA
Tokyo HND	70	90	524	615	1,299	53	49	55	63	220	32.1	83.7	852.7	876.2	490.5
Tokyo NRT	152	200	675	684	1,711	47	40	59	104	250	223.4	400.0	1044.1	557.7	584.4

Source: DBEDT analysis based on scheduled flights from Diiro Mi flight schedules as of April 26, 2022, subject to change.

Group vs. True Independent; Leisure vs. Business

JAPAN MMA (by Air)	2019	2020	2021P	YTD Mar. 2022P	YTD Mar. 2021P	% change YTD
Group vs True Independent (Net)						
Group tour	246,490	NA	292	362	50	618.7%
True Independent (Net)	594,917	NA	23,087	8,393	2,745	205.8%
Leisure vs business						
Pleasure (Net)	1,360,644	247,980	16,915	5,771	1,834	214.8%
MCI (Net)	85,595	18,464	680	527	111	374.0%
Convention/Conf.	12,527	3,983	175	193	23	745.0%
Corp. Meetings	4,068	951	451	82	71	14.3%
Incentive	70,254	13,922	75	277	17	1540.6%

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	2021P	YTD Mar. 2022P	YTD Mar. 2021P	% change YTD
1st timers (%)	31.7	NA	15.3	16.0	19.0	-3.0
Repeaters (%)	68.3	NA	84.7	84.0	81.0	3.0

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.

Tax Revenue

JAPAN MMA (by Air)	2019	2020	2021P	YTD Mar. 2022P	YTD Mar. 2021P	% change YTD
State tax revenue generated (\$ Millions) ^{2/}	262.43	NA	9.67	3.65	1.28	185.9%

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