



# 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 April 2022 Quick Facts<sup>1/</sup>

Visitor Expenditures: \$46.8 million  
 Primary Purpose of Stay: Pleasure (11,059) vs. MCI (873)  
 Average Length of Stay: 13.45 days  
 First Time Visitors: 15.3%  
 Repeat Visitors: 84.7%

JAPAN MMA (by Air)	2019	2020	2021P	2022 Annual Forecast*	YTD Apr. 2022P	YTD Apr. 2021P	% Change YTD
Visitor Expenditures (\$ Millions)	2,248.3	NA	82.9	805.1	46.8	15.5	202.5%
Visitor Days	9,306,767	1,719,843	378,558	3,167,750	212,723	74,367	186.0%
Arrivals	1,576,205	289,137	24,232	521,380	15,817	4,277	269.8%
Average Daily Census	25,498	4,699	1,037	8,679	1,773	620	186.0%
Per Person Per Day Spending (\$)	241.6	NA	218.9	254.2	220.1	208.1	5.8%
Per Person Per Trip Spending (\$)	1,426.4	NA	3,419.5	1,544.3	2,960.0	3,618.6	-18.2%
Length of Stay (days)	5.90	5.95	15.62	6.08	13.45	17.39	-22.6%

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.  
 \*Dept. of Business, Economic Development & Tourism (DBEDT) 2022 annual forecast (Quarter 1, 2022).

## Contact Information

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<sup>1/</sup> 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

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Prior to the global COVID-19 pandemic, Hawai'i achieved record-level visitor expenditures and arrivals in 2019 through February 2020. On March 26, 2020, the state implemented mandatory quarantine and travel restrictions. Subsequently, nearly all trans-Pacific and interisland flights were canceled, cruise ship activities were suspended and tourism to the islands all but shut down. In October 2020, the state initiated the Safe Travels program, which allowed travelers to bypass quarantine if they had a valid negative COVID test. Through March 25, 2022, domestic passengers could bypass the state's mandatory self-quarantine if they were vaccinated or have a negative COVID pre-travel test. The Safe Travels Program ended on March 26, 2022. In April 2022, there were no travel restrictions for passengers arriving on U.S. domestic flights. Passengers arriving on direct international flights were subjected to federal U.S. entry requirements which included up-to-date vaccination document and a negative COVID test taken within one day of travel, or documentation of having recovered from COVID in the past 90 days.

- Through the first four months of 2022 there were 15,817 visitors from Japan compared to 494,416 visitors (-96.8%) in the first four months of 2019.
- Visitors from Japan spent \$46.8 million in the first four months of 2022 compared to \$688.1 million (-93.2%) in the first four months of 2019.
- There were 323 scheduled flights with 71,506 seats in the first four months of 2022, compared to 2,656 flights with 664,654 seats in the first four months 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

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- On April 1, 2022, Ministry of Foreign Affairs of Japan (MOFA) eased travel advisory from Level 3 "Avoid All Travel" to Level 2 "Avoid Non-essential Travel" for 106 countries, including the U.S., for the first time since 2020. This is a big step for Japanese travel agencies to start selling package tours. From April 10, Japan will increase its daily new entry capacity up to 10,000 passengers.
- The depreciation of the yen is progressing rapidly, and on April 28, 2022, it temporarily reached the 131-yen level as 20 years ago. The inflation rate in April averaged 2 percent for the first time in about seven years due to influence of the situation in Ukraine.
- Nikkei NEEDS predicts Japan GDP growth rate in 2022 to be 1.9 percent. In the first quarter of 2022, the growth rate was -0.2 percent, however, it is expected to pick up from April 2022, with increase of personal travel.
- According to Japan National Tourism Organization (JNTO), the number of Japanese departures in March 2022 was 70,700, a significant increase of about 1.5 times compared to March 2021.

The major factors are the relaxation of border measures and increase in the maximum number of entries.

- With the relaxation of border measures in Japan and the reduction of the travel advisory level, travel agencies are starting to sell Hawai'i's travel products. JTB, JALPAK, and ANA X have started selling their tour packages from April 15, 24, 29 respectively. HIS will start to sell one of their major packages CIAO from May 1. Kintetsu will resume selling their tours from June 1, 2022.
- During Golden Week, reservation of international flights for Hawai'i, carrier bookings increased from 90 to 100 percent in business class and 40 percent to 85 percent in economy class. A total of approximately 7,000 people were booked for Hawai'i for the Golden week.
- The crude oil price has been soaring. The surcharges for tickets issued in June 2022 are currently at 23,600 yen for JAL and 23,800 yen for ANA for Hawai'i routes.
- ANA announced the resumption of Narita-Honolulu flights twice a week for the A380 FLYING HONU (520 seats) from July 2022.
- In April 2022, there were a total of 87 flights with 20,263 seats by four airlines (ANA, Hawaiian, JAL, and ZIPAIR), according to Diio Mi flight schedules.

## Distribution by Island

JAPAN MMA (by Air)	2019	2020	2021P	YTD Apr. 2022P	YTD Apr. 2021P	% change YTD
O'ahu	1,492,753	269,402	23,130	14,798	4,124	258.9%
Maui County	48,524	8,265	912	1,009	92	998.2%
Maui	46,684	7,929	902	961	92	946.3%
Moloka'i	1,941	416	17	1	5	-76.5%
Lāna'i	2,300	128	20	49	7	621.8%
Kaua'i	25,333	3,622	424	349	27	1180.2%
Island of Hawai'i	170,686	35,453	1,360	1,588	125	1171.9%

## 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
<b>JAPAN</b>	<b>51,243</b>	<b>72,941</b>	<b>424,653</b>	<b>461,960</b>	<b>1,010,797</b>	<b>30,717</b>	<b>24,354</b>	<b>32,490</b>	<b>44,205</b>	<b>131,766</b>	<b>66.8</b>	<b>199.5</b>	<b>1207.0</b>	<b>945.0</b>	<b>667.1</b>
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
<b>JAPAN</b>	<b>236</b>	<b>307</b>	<b>1,505</b>	<b>1,667</b>	<b>3,715</b>	<b>118</b>	<b>102</b>	<b>128</b>	<b>181</b>	<b>529</b>	<b>100.0</b>	<b>201.0</b>	<b>1075.8</b>	<b>821.0</b>	<b>602.3</b>
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 Diio 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 Apr. 2022P	YTD Apr. 2021P	% change YTD
Group vs True Independent (Net)						
Group tour	246,490	NA	292	752	53	1308.0%
True Independent (Net)	594,917	NA	23,087	14,450	4,084	253.8%
Leisure vs business						
Pleasure (Net)	1,360,644	247,980	16,915	11,059	2,793	296.0%
MCI (Net)	85,595	18,464	680	873	143	511.6%
Convention/Conf.	12,527	3,983	175	349	25	1291.3%
Corp. Meetings	4,068	951	451	204	100	104.7%
Incentive	70,254	13,922	75	391	18	2061.5%

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	2021P	YTD Apr. 2022P	YTD Apr. 2021P	% change YTD
1st timers (%)	31.7	NA	15.3	15.3	16.0	-0.7
Repeaters (%)	68.3	NA	84.7	84.7	84.0	0.7

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.

## Tax Revenue

JAPAN MMA (by Air)	2019	2020	2021P	YTD Apr. 2022P	YTD Apr. 2021P	% change YTD
State tax revenue generated (\$ Millions) <sup>2/</sup>	262.43	NA	9.67	5.43	1.81	200.6%

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