

# Japan Market Statistics Update

2019 December Edition

HAWAII TOURISM

JAPAN

ハワイ州観光局

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# Market Overview

## Market Conditions

<u>FX Rate</u>	2019 December	109.18 JPY / USD
<u>Unemployment</u>	2019 December	2.2%
<u>Fuel Surcharge</u>	2020 February	¥ 12,000

## Japan Travel Market

<u>Inbound</u>	2019 December	2.53 mil	2019 YTD	31.88 mil
<u>Outbound</u>	2019 December	1.71 mil	2019 YTD	20.08 mil

## Hawaii Travel Market (Japan)

<u>Arrivals</u>	2019 December	136,998	2019 YTD	1,545,806
<u>Spending</u>	2019 December	\$210.1 mil	2019 YTD	\$2,187.2 mil

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# JAPAN MARKET CONDITIONS

# Japan Market Conditions: Economy

2019



FX Exchange

**December High**

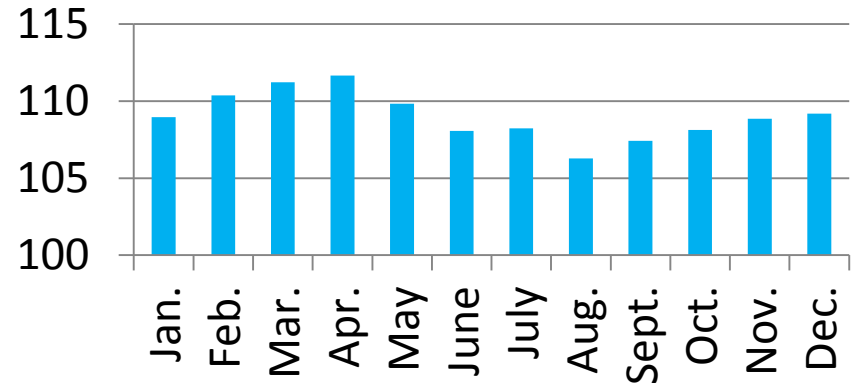
**109.73**

**December Low**

**108.43**

Source: Bank of Japan

**2019 USD to JPY FX Rate**



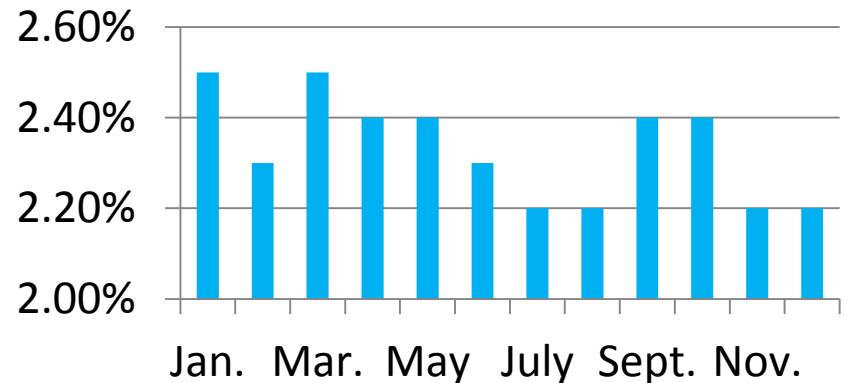
Unemployment

**December Unemployment**

**2.20%**

Source: Statistics Bureau of Japan

**2019 Japan Unemployment**



# Japan Market Conditions: FSC

2020 February (Round-trip)



= ¥ 12,000



= ¥ 12,000



= ¥ 12,000



= ¥ 12,000



= ¥ 12,000



= ¥ 12,000

Source: Various Official Airline Websites

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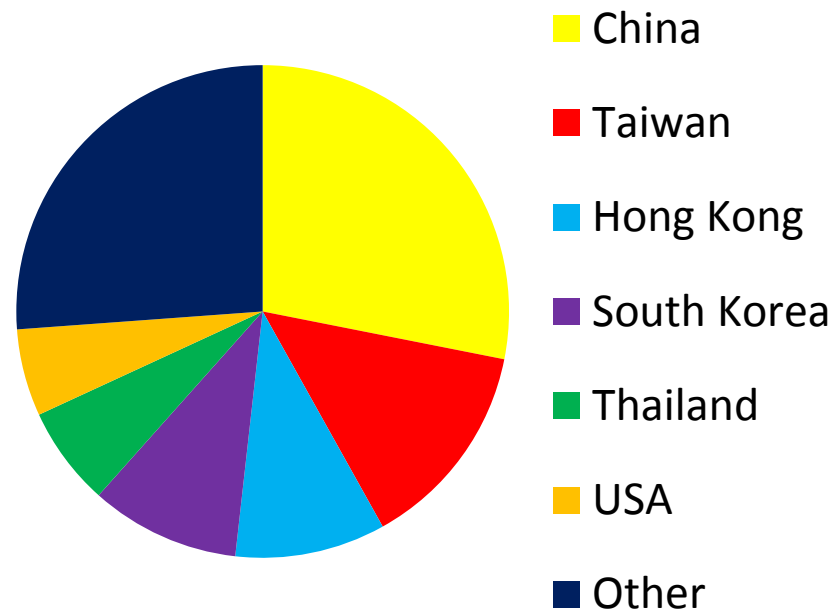
# JAPAN INBOUND MARKET DATA

# Japan Inbound Travel - Count

(2019 December)

## Japan Inbound Travel December 2019

	December 2019	December 2018	% Change
Total Japan Inbound	2,526,400	2,631,776	↓ -4.0%
China	710,200	599,086	↑ 18.5%
Taiwan	348,300	335,790	↑ 3.7%
Hong Kong	249,600	209,454	↑ 19.2%
South Korea	248,000	681,566	↓ -63.6%
Thailand	164,900	128,304	↑ 28.5%
USA	144,500	126,850	↑ 13.9%



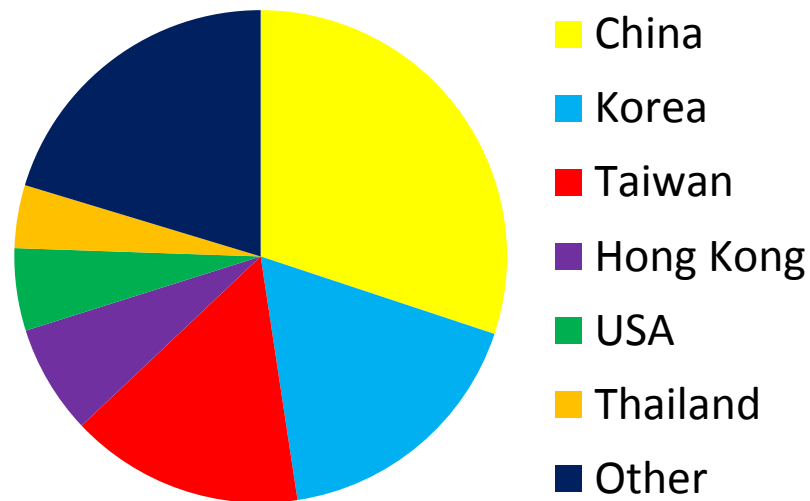


# Japan Inbound Travel - Count

(2019 December YTD)

## Japan Inbound Travel 2019

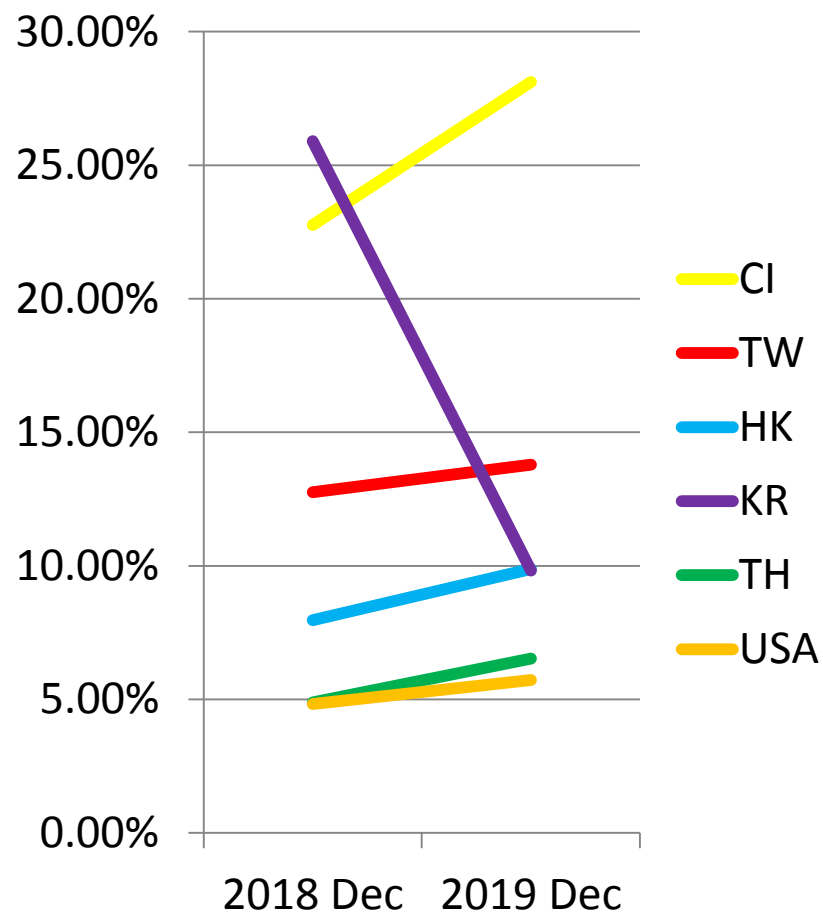
	2019 YTD	2018 YTD	% Change
Total Japan Inbound	31,882,088	31,191,856	↑ 2.2%
China	9,594,309	8,380,034	↑ 14.5%
South Korea	5,584,596	7,538,952	↓ -25.9%
Taiwan	4,890,631	4,757,258	↑ 2.8%
Hong Kong	2,290,748	2,207,804	↑ 3.8%
USA	1,723,870	1,526,407	↑ 12.9%
Thailand	1,318,976	1,132,160	↑ 16.5%



# Japan Inbound Travel – Market Share

(2019 December)

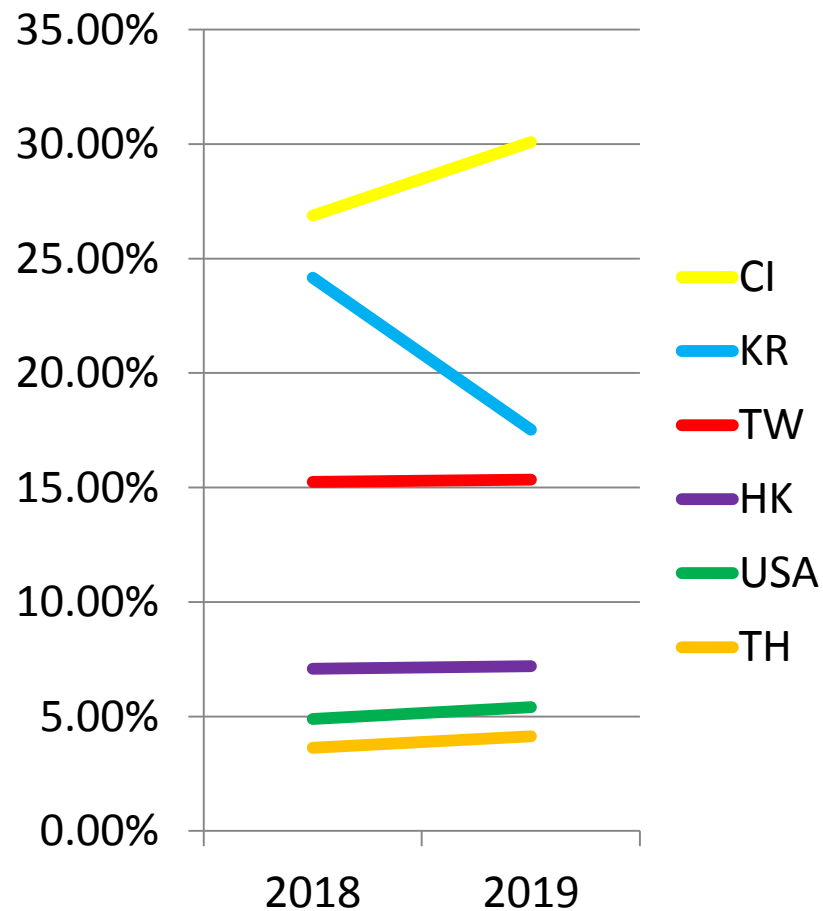
	2019 December Market Share	2018 December Market Share	Market Share Change
Total Japan Inbound			
China	28.11%	22.76%	↑ 5.3%
Taiwan	13.79%	12.76%	↑ 1.0%
Hong Kong	9.88%	7.96%	↑ 1.9%
South Korea	9.82%	25.90%	↓ -16.1%
Thailand	6.53%	4.88%	↑ 1.7%
USA	5.72%	4.82%	→ 0.9%



# Japan Inbound Travel – Market Share

(2019 December YTD)

	2019 YTD Market Share	2018 YTD Market Share	Market Share Change
Total Japan Inbound			
China	30.09%	26.87%	↑ 3.2%
South Korea	17.52%	24.17%	↓ -6.7%
Taiwan	15.34%	15.25%	→ 0.1%
Hong Kong	7.19%	7.08%	→ 0.1%
USA	5.41%	4.89%	→ 0.5%
Thailand	4.14%	3.63%	→ 0.5%



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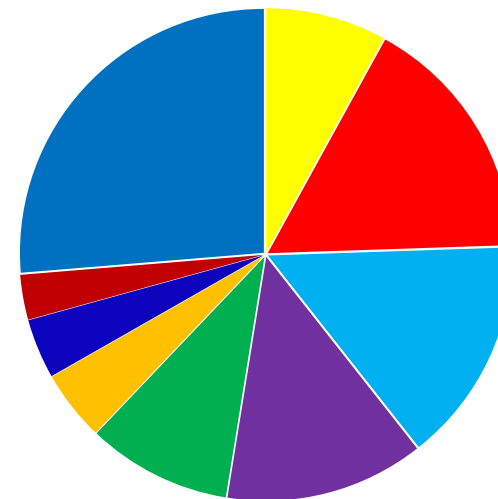
# JAPAN OUTBOUND MARKET DATA

# Japan Outbound Travel - Count

(2019 December)

## Japan Outbound Travel 2019 December

	December 2019	December 2018	% Change
Total Japan Outbound	1,712,300	1,629,350	↑ 5.1%
Hawaii	136,998	127,620	↑ 7.3%
Korea	255,356	258,521	↓ -1.2%
Taiwan	225,350	200,098	↑ 12.6%
Thailand	163,609	153,989	↑ 6.2%
Vietnam	79,737	70,711	↑ 12.8%
Guam	67,794	62,037	↑ 9.3%
Hong Kong	51,033	126,195	↓ -59.6%



- Hawaii
- China \*
- Korea
- Taiwan
- Thailand
- Vietnam
- Guam
- Hong Kong
- Other

Note\*: Data for China is an estimate and has not been officially released

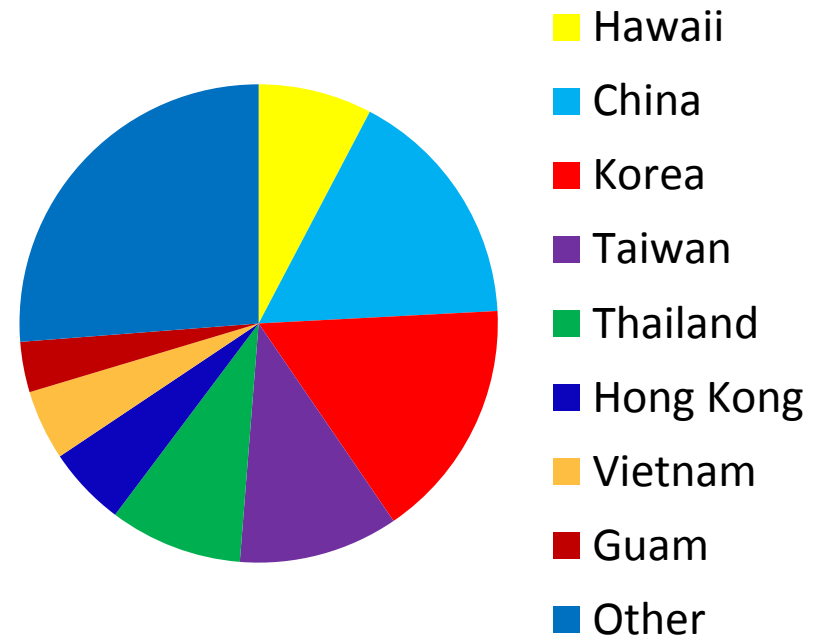
Source: Japan Tourism Marketing Co.

# Japan Outbound Travel - Count

(2019 December YTD)

	2019 YTD	2018 YTD	% Change
Total Japan Outbound	20,080,648	18,954,031	↑ 5.9%
Hawaii	1,545,806	1,489,778	↑ 3.8%
Korea	3,271,706	2,948,527	↑ 11.0%
Taiwan	2,167,952	1,969,151	↑ 10.1%
Thailand	1,805,888	1,656,078	↑ 9.0%
Hong Kong	1,078,836	1,287,773	↓ -16.2%
Vietnam	951,962	826,674	↑ 15.2%
Guam	684,802	563,386	↑ 21.6%

## Japan Outbound Travel 2019



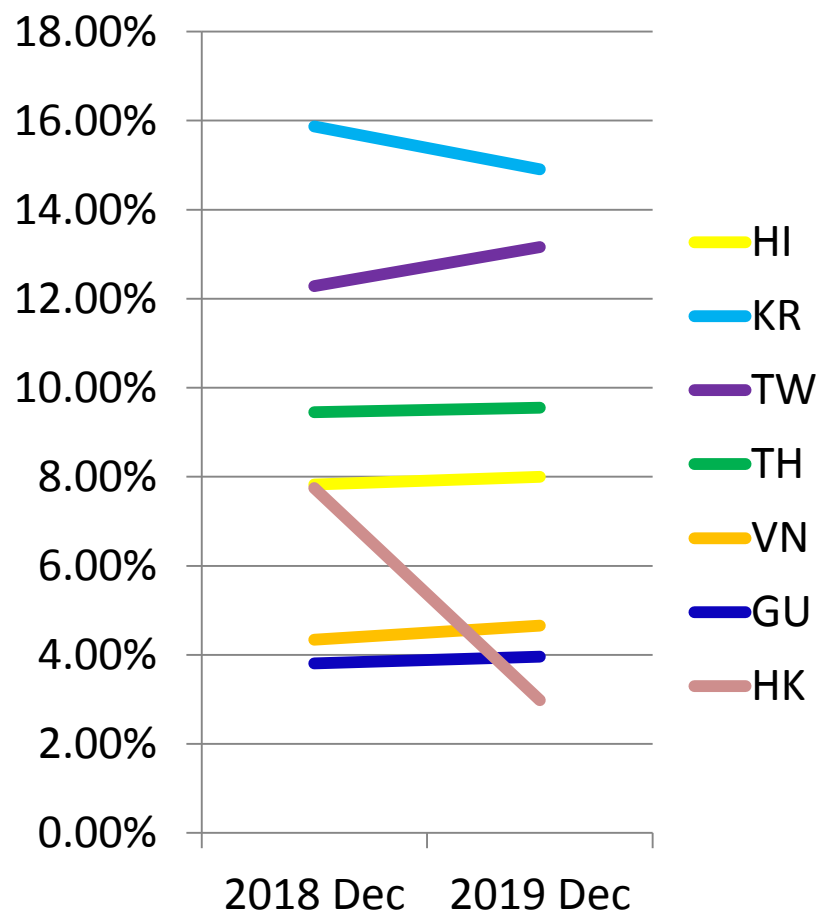
Note\*: Data for China is an estimate and has not been officially released

Source: Japan Tourism Marketing Co.

# Japan Outbound Travel – Market Share

(2019 December)

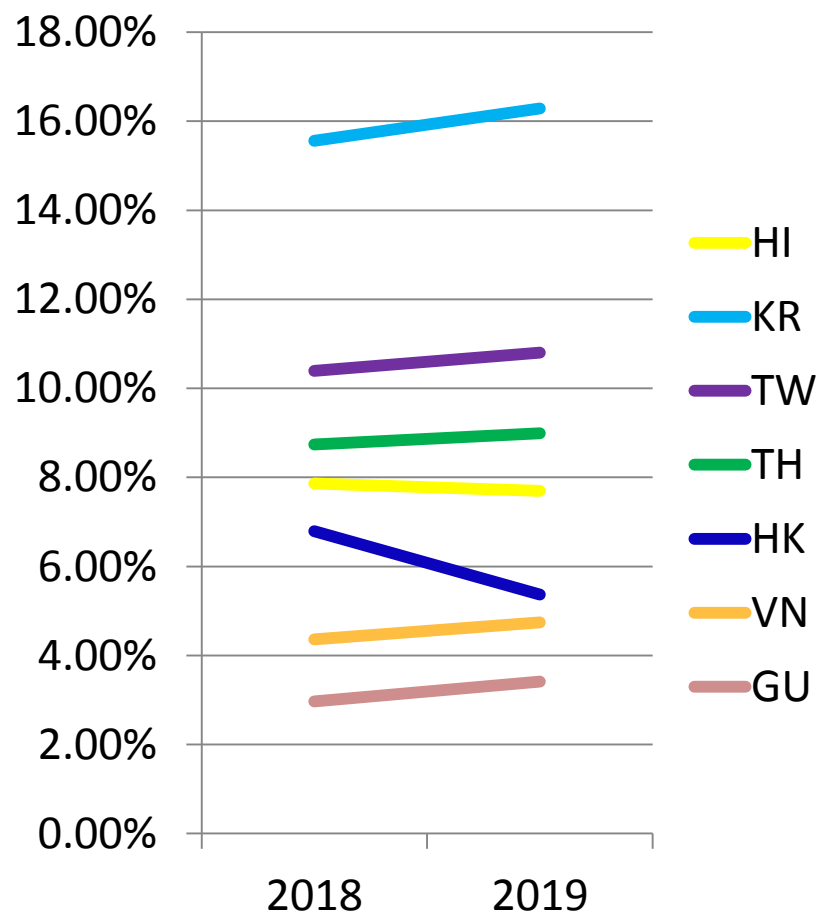
	December 2019 Market Share	December 2018 Market Share	Market Share Change
Total Japan Outbound			
Hawaii	8.00%	7.83%	→ 0.2%
Korea	14.91%	15.87%	↓ -1.0%
Taiwan	13.16%	12.28%	→ 0.9%
Thailand	9.55%	9.45%	→ 0.1%
Vietnam	4.66%	4.34%	→ 0.3%
Guam	3.96%	3.81%	→ 0.2%
Hong Kong	2.98%	7.75%	↓ -4.8%



# Japan Outbound Travel – Market Share

(2019 December YTD)

	2019 YTD Market Share	2018 YTD Market Share	Market Share Change
Total Japan Outbound			
Hawaii	7.70%	7.86%	↓ -0.2%
Korea	16.29%	15.56%	→ 0.7%
Taiwan	10.80%	10.39%	→ 0.4%
Thailand	8.99%	8.74%	→ 0.3%
Hong Kong	5.37%	6.79%	↓ -1.4%
Vietnam	4.74%	4.36%	→ 0.4%
Guam	3.41%	2.97%	→ 0.4%





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# JAPAN VISITOR TO HAWAII DATA

# Japan Visitors to Hawaii

(2019 December YTD)

## 2019 December

Japanese Visitor Statistics	December 2019	2018		Δ 2018
Visitor Arrivals	136,998	127,620	↑	7.3%
Visitor Spending (\$mil.)	210.1	185.5	↑	13.2%
Daily Spend (\$pppd)	258.2	243.2	↑	6.2%
Airlift (scheduled seats)	173,443	174,294	↓	-0.5%

## 2019 YTD

Japanese Visitor Statistics	2019	2018		Δ 2018
Visitor Arrivals	1,545,806	1,489,778	↑	3.8%
Visitor Spending (\$mil.)	2,187.2	2,144.7	↑	2.0%
Daily Spend (\$pppd)	239.8	241.2	↓	-0.6%
Airlift (scheduled seats)	1,999,204	2,042,595	↓	-2.1%

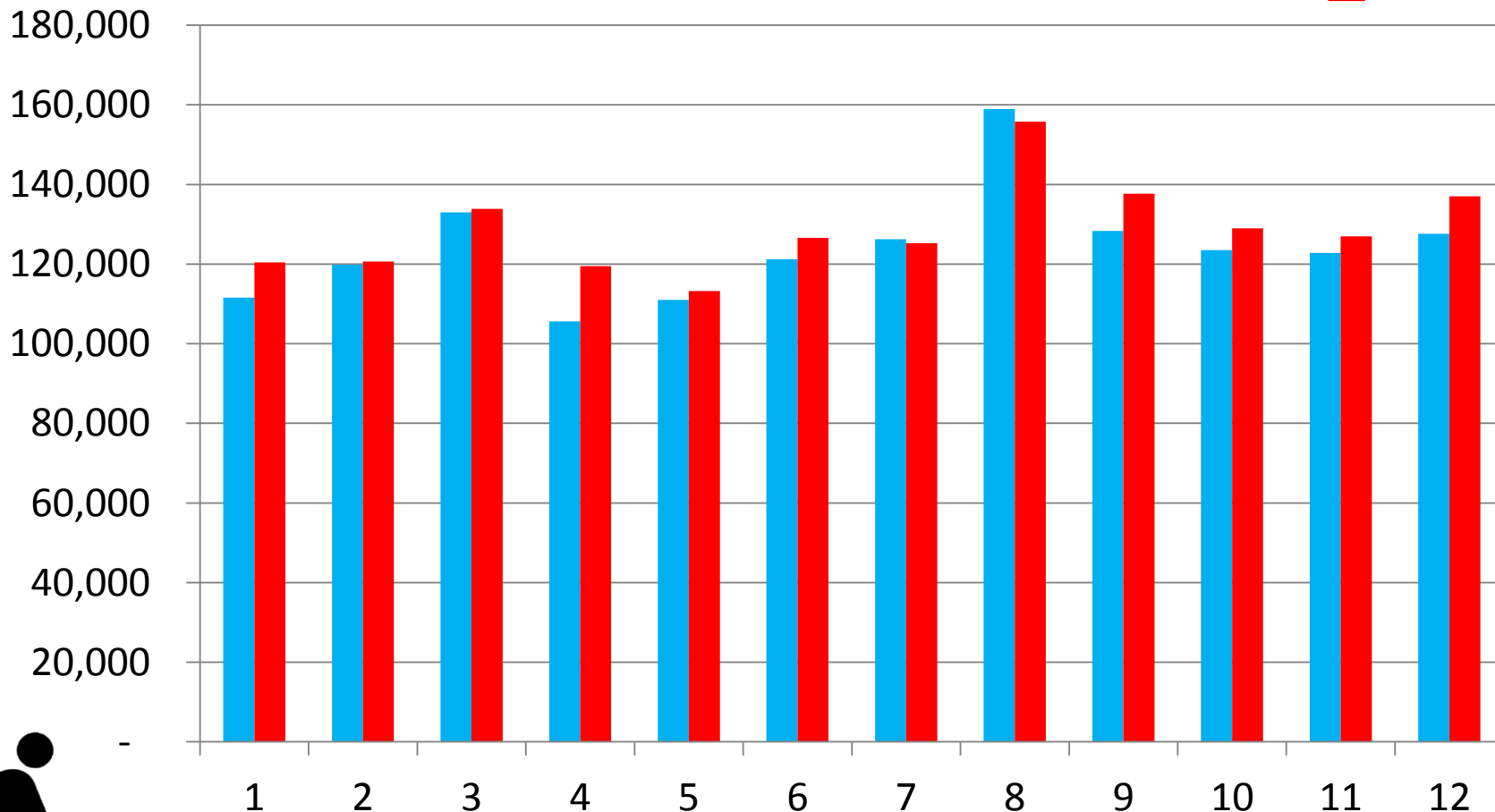
Island Distribution	December 2019	2018		Δ 2018
Oahu	129,338	121,220	↑	6.7%
Maui	2,870	3,431	↓	-16.3%
Molokai	276	34	↑	714.3%
Lanai	292	102	↑	185.7%
Kauai	1,923	1,711	↑	12.4%
Hawaii Island	17,011	12,963	↑	31.2%

Island Distribution	2019	2018		Δ 2018
Oahu	1,462,696	1,399,307	↑	4.5%
Maui	45,935	48,450	↓	-5.2%
Molokai	1,926	1,200	↑	60.5%
Lanai	2,276	1,763	↑	29.1%
Kauai	24,915	24,806	→	0.4%
Hawaii Island	168,640	176,499	↓	-4.5%

# Japan Visitors to Hawaii: Arrivals

(2019 December YTD)

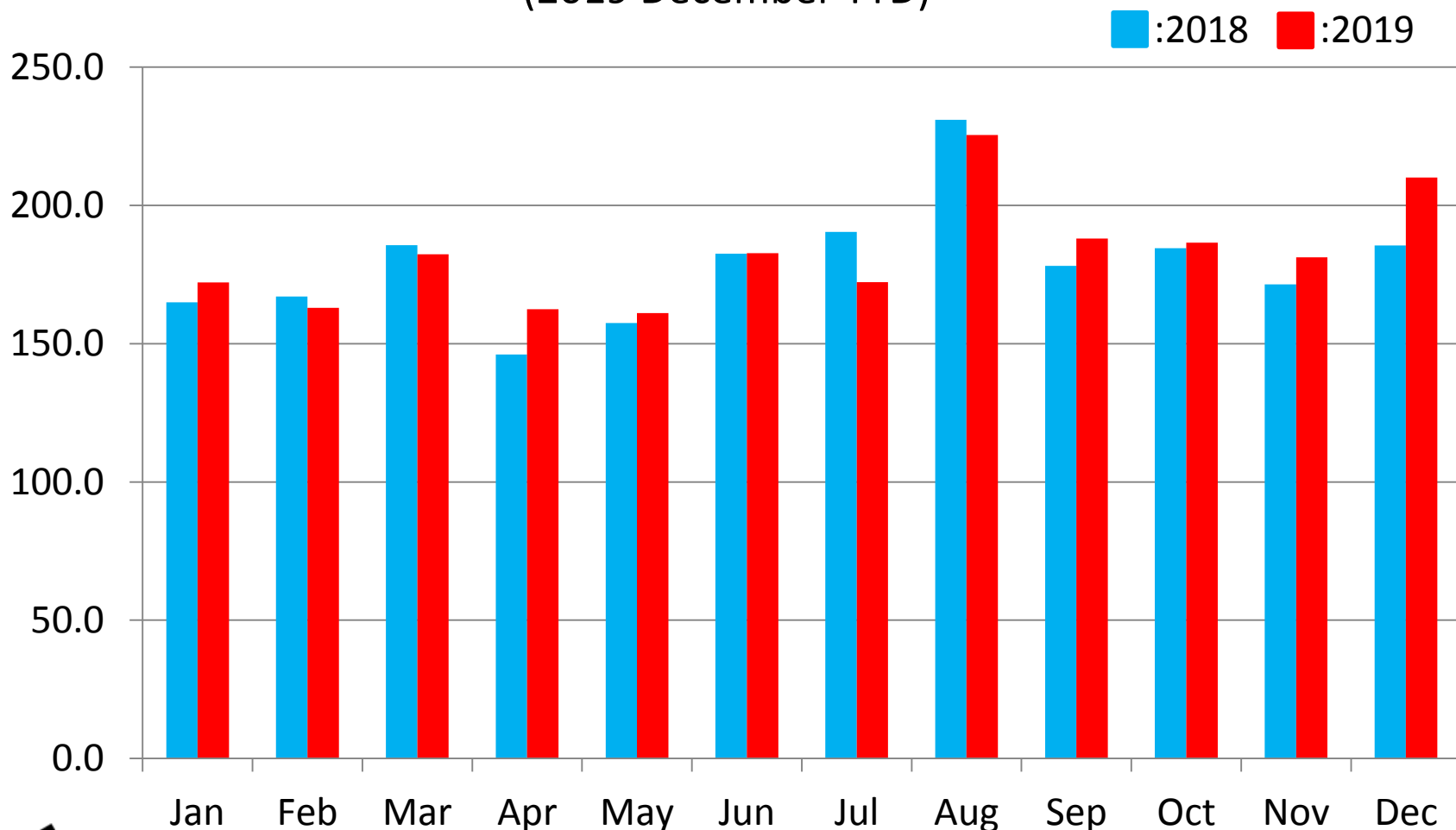
■:2018 ■:2019



Visitor Arrivals	2019	2018	Δ 2018
December	136,998	127,620	+7.3%
YTD	1,545,806	1,489,778	+3.8%

# Japan Visitors to Hawaii: Spending (\$mil)

(2019 December YTD)

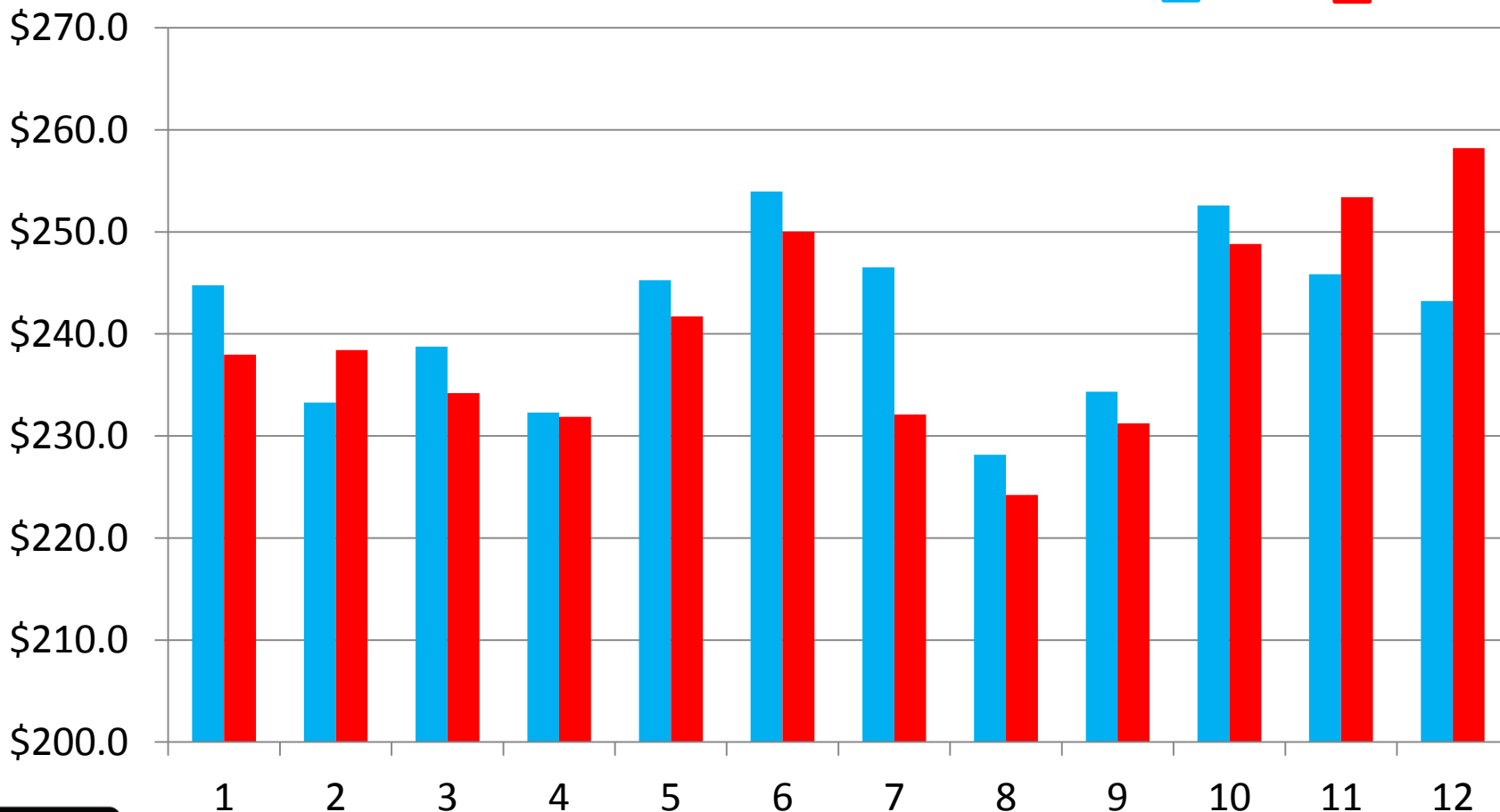


Spending (\$mil)	2019	2018	Δ 2018
December	\$210.1	\$185.5	+13.2%
YTD	\$2,187.2	\$2,144.7	+2.0%

# Japan Visitors to Hawaii: Daily Spending

(2019 December YTD)

■ :2018 ■ :2019

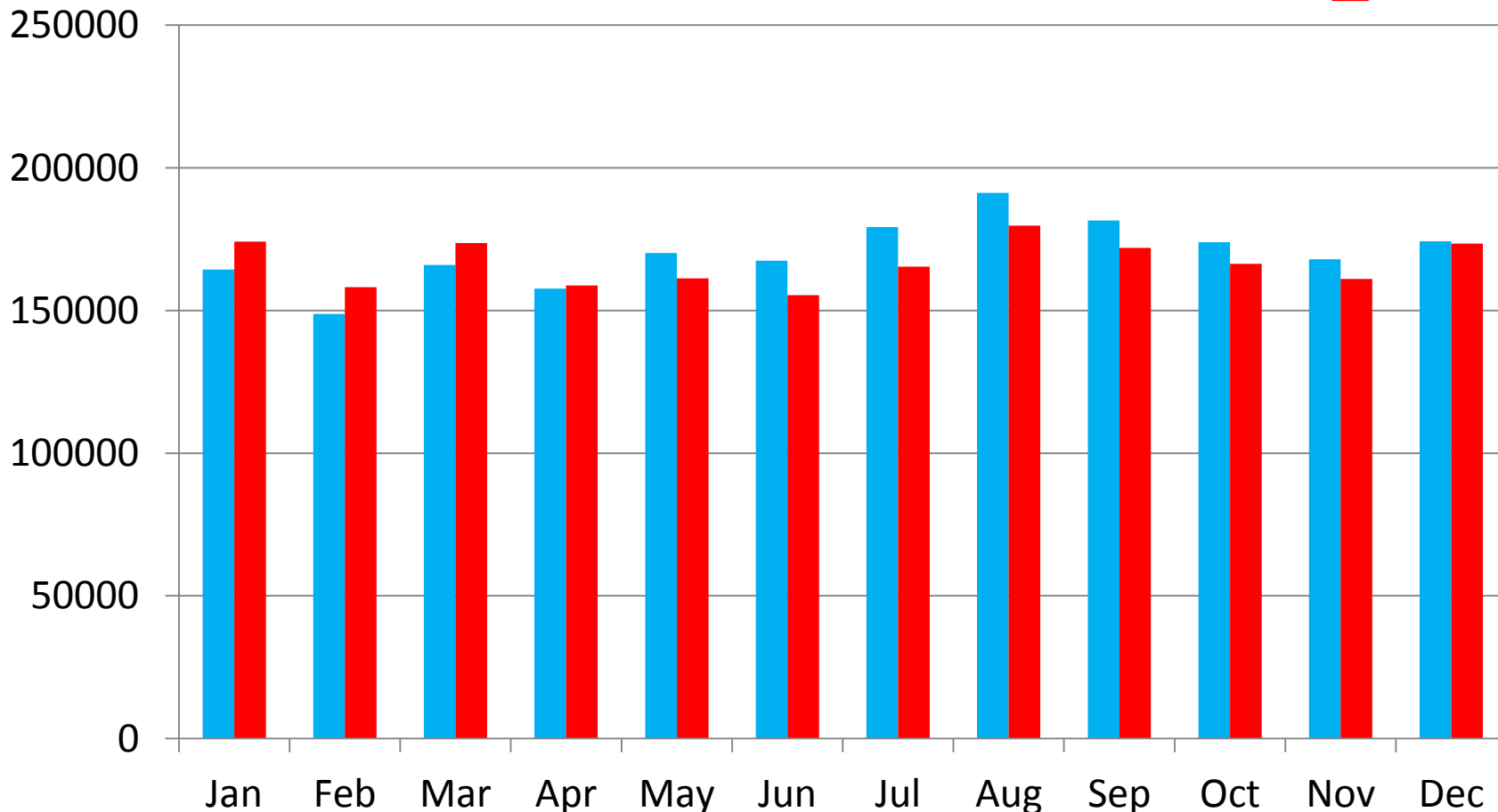


Daily Spending	2019	2018	Δ 2018
December	\$258.2	\$243.2	+6.2%
YTD	\$239.8	\$241.2	-0.6%

# Japan Visitors to Hawaii: Airlift

(2019 December YTD)

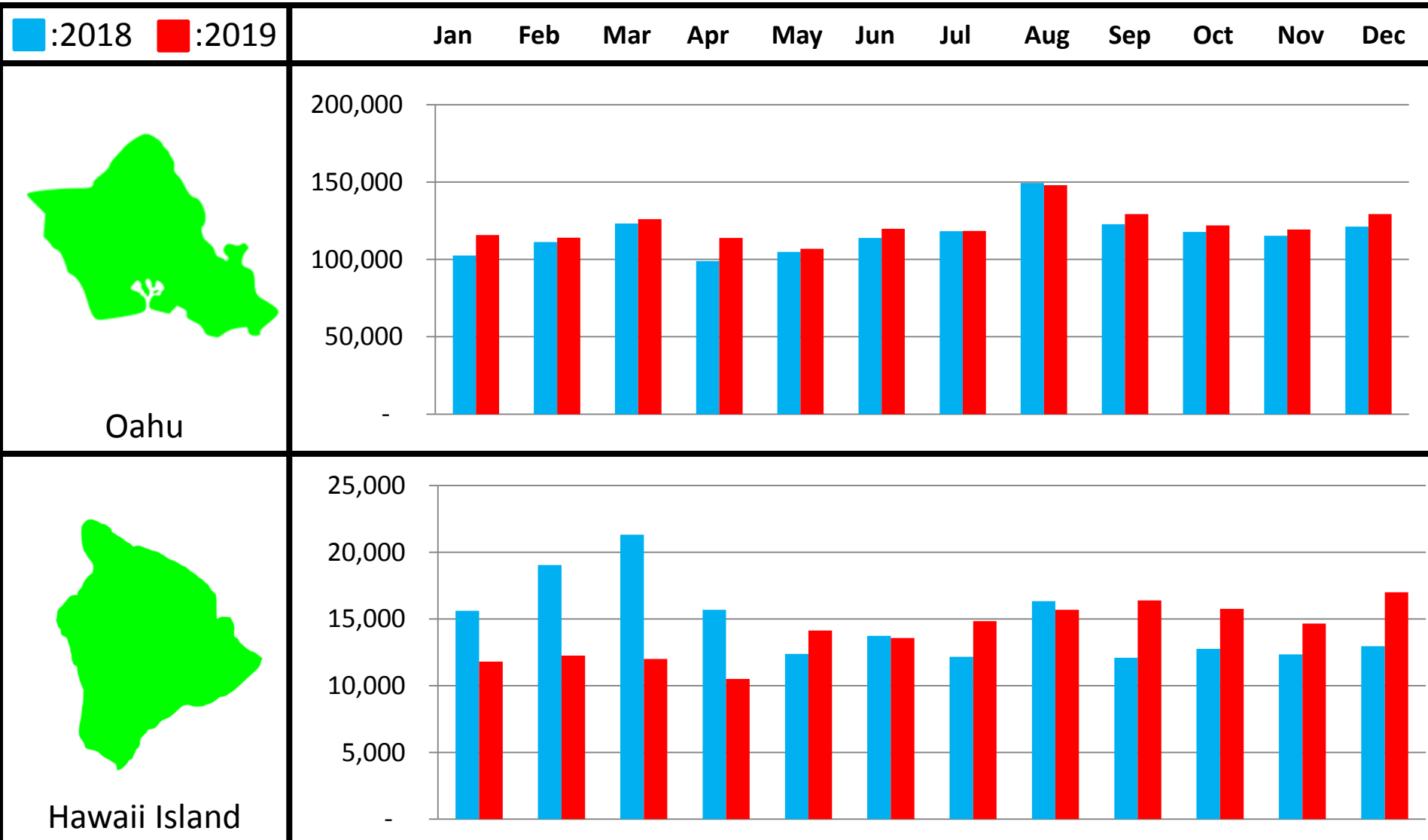
■:2018 ■:2019



Airlift	2019	2018	Δ 2018
December	173,443	174,294	-0.5%
YTD	1,999,204	2,042,595	-2.1%

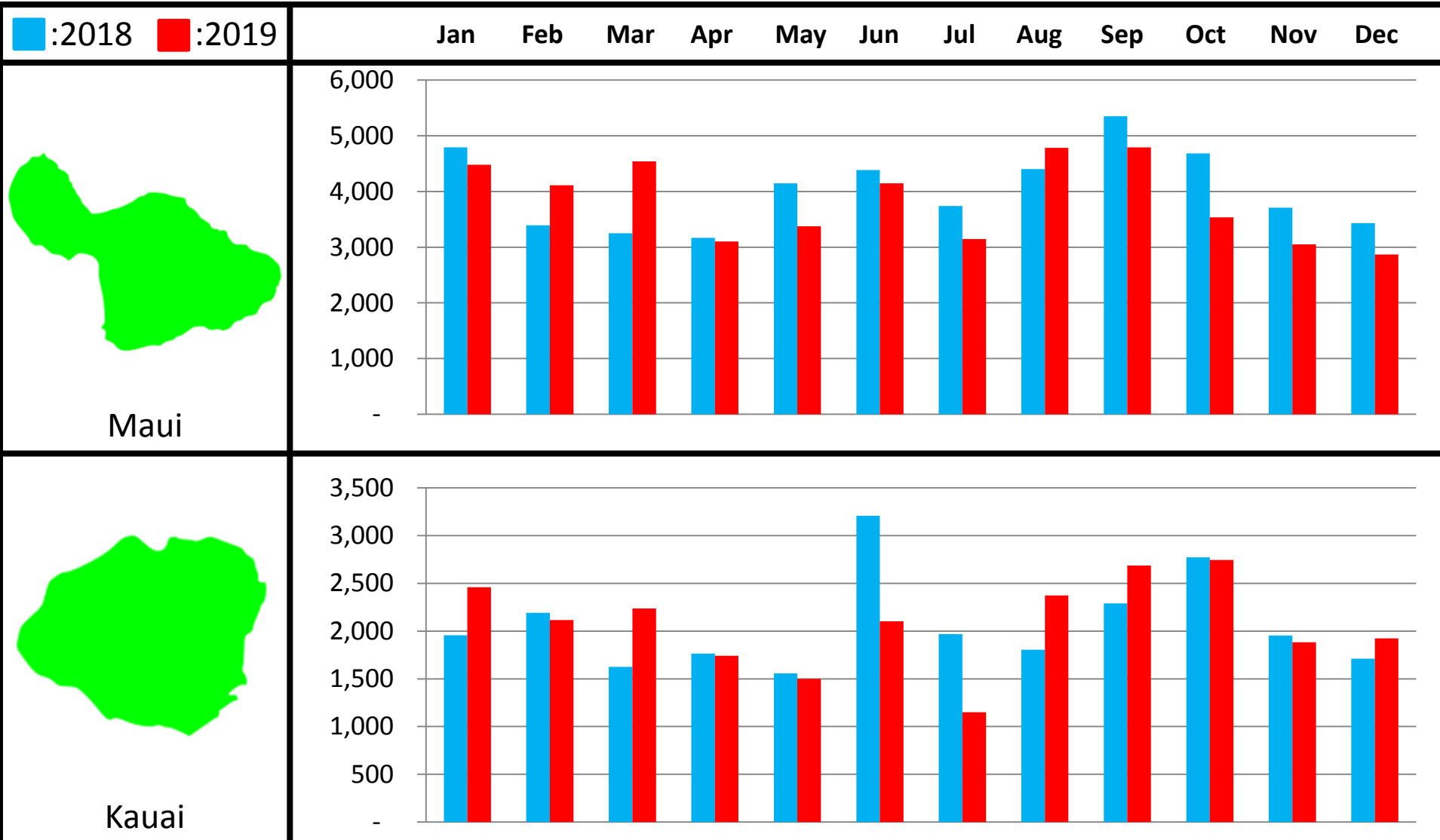
# Japan Visitors Island Breakdown

(2019 December YTD)



# Japan Visitors Island Breakdown

(2019 December YTD)





# Japan Visitors to Hawaii: Profile

December 2019 (Market Share)



= 70.8%

Leisure



= 11.4%

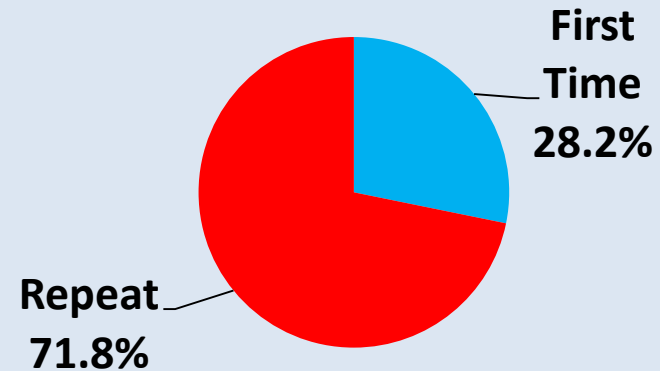
Romance



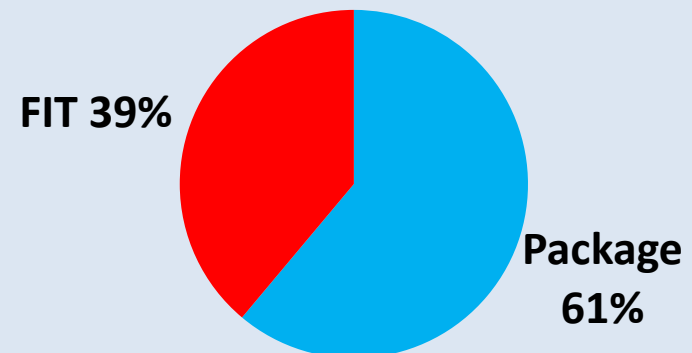
= 6.3 %

MICE

## Traveler Status



## Traveler Type



# Japan Visitors to Hawaii: Profile

2019 YTD (Market Share)



= 74.0%

Leisure



= 12.9%

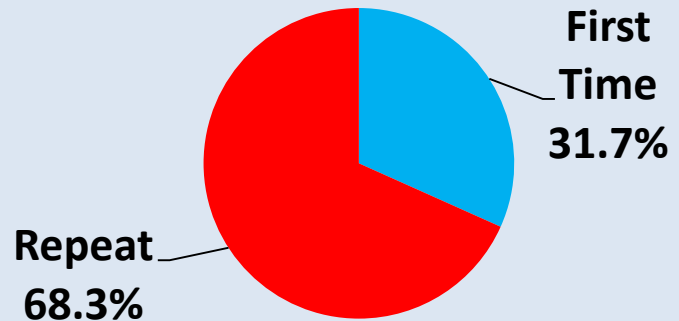
Romance



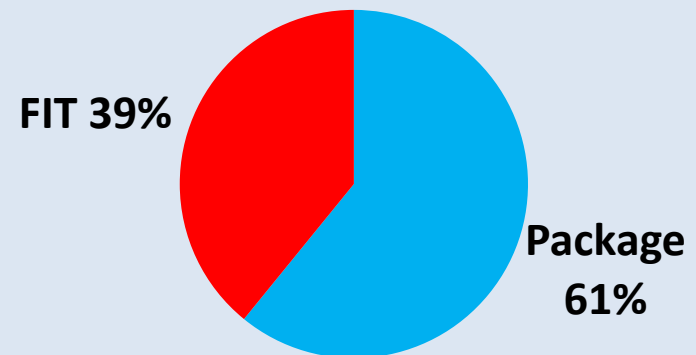
= 5.7 %

MICE

## Traveler Status



## Traveler Type



# Japan Visitors to Hawaii: Profile

December 2019

Travel Reason	2019	2018	%Δ
Honeymoon/Get Married	15,658	15,411	+1.6%
Pleasure/Vacation	97,062	89,209	+8.8%
MICE	8,683	4,341	+100.0%

Travel Status	2019	2018	%Δ
First Time Traveler	28.2%	29.8%	-1.6%
Repeat Traveler	71.8%	70.2%	+1.6%

Travel Type	2019	2018	%Δ
Package Trip	80,595	70,543	+14.2%
True Independent	51,308	52,100	-1.5%

# Japan Visitors to Hawaii: Profile

2019 YTD

Travel Reason	2019	2018	%Δ
Honeymoon/Get Married	199,363	192,293	+3.7%
Pleasure/Vacation	1,143,135	1,063,333	+7.5%
MICE	87,687	96,102	-8.8%

Travel Status	2019	2018	%Δ
First Time Traveler	31.7%	33.1%	-1.3%
Repeat Traveler	68.3%	66.9%	+1.3%

Travel Type	2019	2018	%Δ
Package Trip	905,576	837,524	+8.1%
True Independent	582,079	591,168	-1.5%

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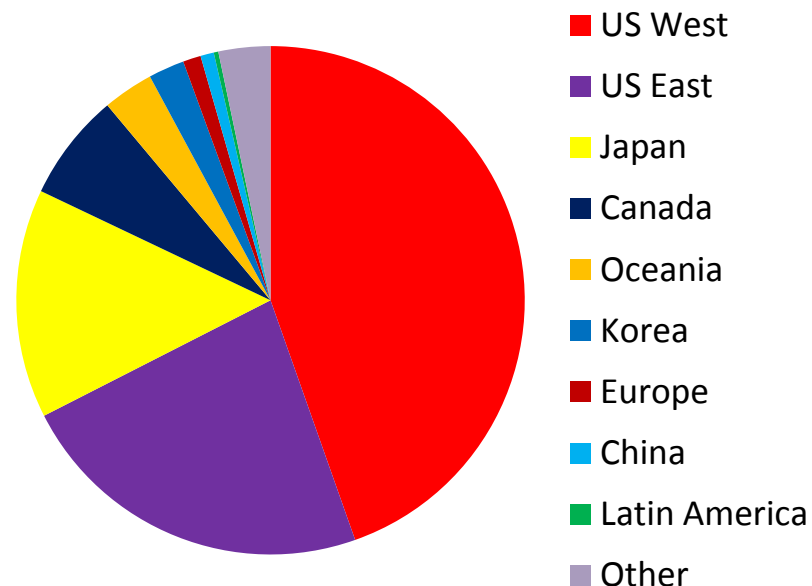
# HAWAII INBOUND MARKET DATA BY AIR

# Hawaii Inbound Travel Data by air – count

## (2019 December)

	December 2019	December 2018	% Change
Total Hawaii Inbound	942,969	883,453	↑ 6.7%
US West	419,311	383,367	↑ 9.4%
US East	215,309	196,692	↑ 9.5%
Japan	136,998	127,620	↑ 7.3%
Canada	64,353	69,753	↓ -7.7%
Oceania	30,317	32,785	↓ -7.5%
Korea	21,521	17,890	↑ 20.3%
Europe	10,694	10,376	↑ 3.1%
China	8,005	8,187	↓ -2.2%
Latin America	2,751	3,161	↓ -13.0%
Other	30,993	30,609	↑ 1.3%

**Visitor Arrivals December 2019**

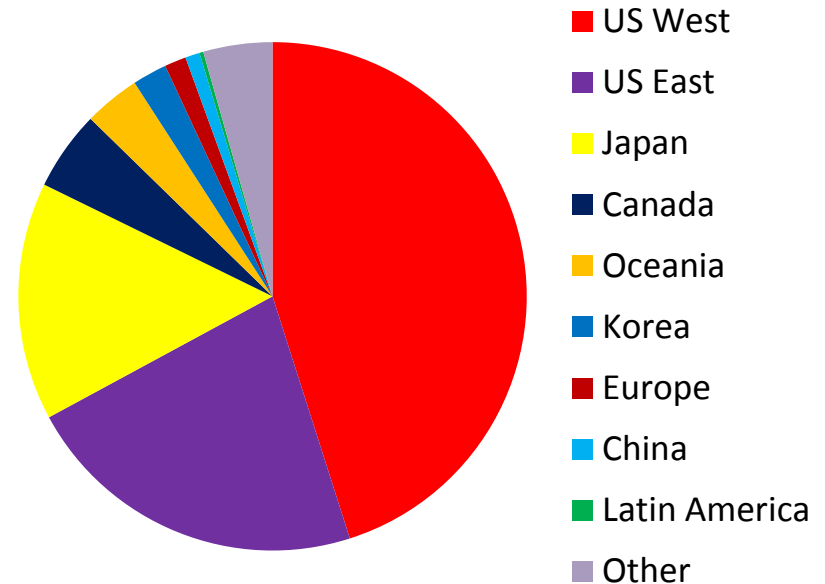


# Hawaii Inbound Travel Data by air – count

## (2019 December YTD)

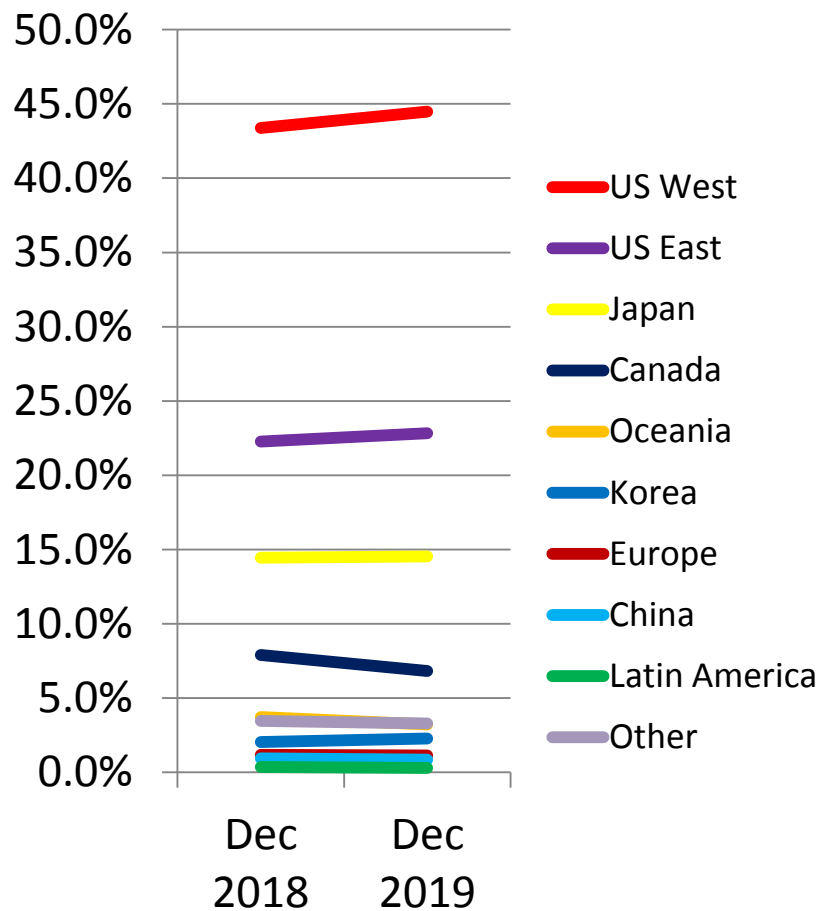
	2019 YTD	2018 YTD	% Change
Total Hawaii Inbound	10,282,160	9,761,448	↑ 5.3%
US West	4,614,203	4,203,894	↑ 9.8%
US East	2,265,012	2,173,458	↑ 4.2%
Japan	1,545,806	1,489,778	↑ 3.8%
Canada	535,267	548,702	↓ -2.4%
Oceania	362,360	415,764	↓ -12.8%
Korea	225,479	228,350	↓ -1.3%
Europe	138,550	144,953	↓ -4.4%
China	93,703	123,246	↓ -24.0%
Latin America	25,957	27,778	↓ -6.6%
Other	439,756	377,196	↑ 16.6%

### Visitor Arrivals 2019



# Hawaii Inbound Travel Data by air – market share (2019 December)

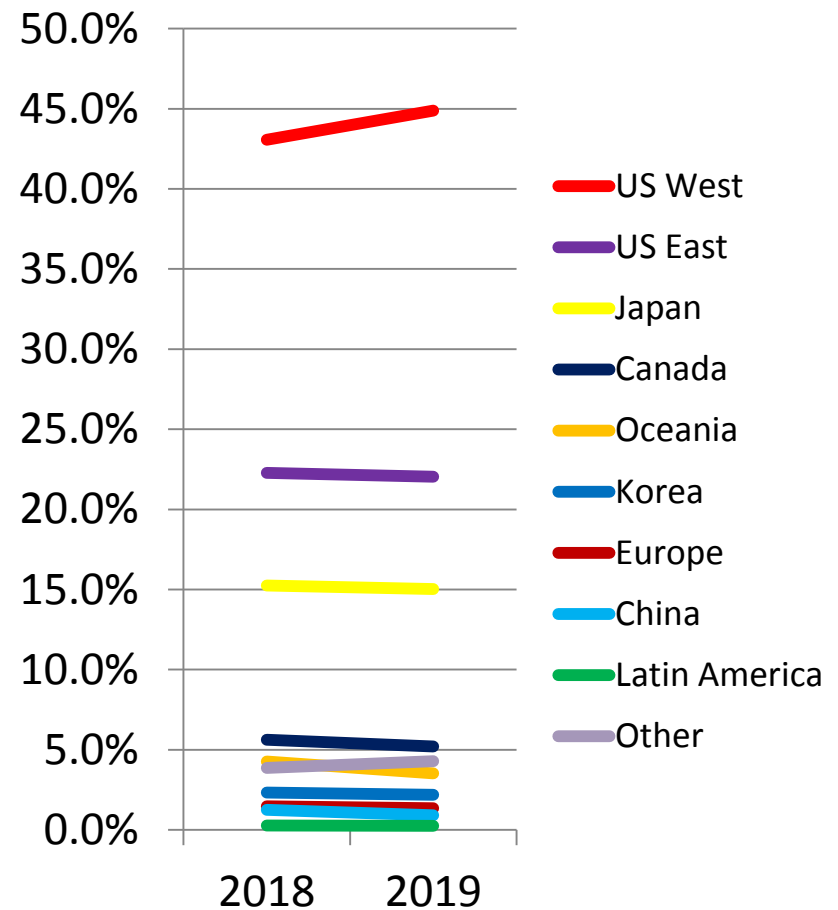
	2019 Market Share	2018 Market Share	Change Market Share
Total Hawaii Inbound			
US West	44.47%	43.39%	↑ 1.1%
US East	22.83%	22.26%	→ 0.6%
Japan	14.53%	14.45%	→ 0.1%
Canada	6.82%	7.90%	↓ -1.1%
Oceania	3.22%	3.71%	↓ -0.5%
Korea	2.28%	2.03%	→ 0.3%
Europe	1.13%	1.17%	↓ 0.0%
China	0.85%	0.93%	↓ -0.1%
Latin America	0.29%	0.36%	↓ -0.1%
Other	3.29%	3.46%	↓ -0.2%





# Hawaii Inbound Travel Data by air – market share (2019 December YTD)

	2019 Market Share	2018 Market Share	Change Market Share
Total Hawaii Inbound			
US West	44.88%	43.07%	↑ 1.8%
US East	22.03%	22.27%	↓ -0.2%
Japan	15.03%	15.26%	↓ -0.2%
Canada	5.21%	5.62%	↓ -0.4%
Oceania	3.52%	4.26%	↓ -0.7%
Korea	2.19%	2.34%	↓ -0.1%
Europe	1.35%	1.48%	↓ -0.1%
China	0.91%	1.26%	↓ -0.4%
Latin America	0.25%	0.28%	↓ 0.0%
Other	4.28%	3.86%	→ 0.4%



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# JAPAN HAWAII DIRECT ROUTE ENVIRONMENT SUMMARY

# Japan Hawaii Scheduled Direct Route Flight Summary

Airline & Flight Number	Route	Schedule	Daily Seats	Weekly Seats
<b>AirAsia X (1)</b>				
D7001	Kansai – Honolulu	Daily	377	2,639
<b>Delta Air Lines (3)</b>				
DL180	Narita – Honolulu	Daily	225	1,575
DL278	Kansai – Honolulu	Daily	225	1,575
DL612	Nagoya – Honolulu	M., Tu., Th., Fr., Su.	225	1,125
<b>Hawaiian Airlines (7)</b>				
HA442	Shin-Chitose – Honolulu	Su., W., F.	278	834
HA450	Kansai – Honolulu	Daily	278	1,946
HA458	Haneda – Honolulu	Daily	278	1,946
HA822	Narita – Honolulu	Daily	278	1,946
HA828	Fukuoka – Honolulu	Su., M., W., Sa.	278	1,112
HA852	Haneda – Kona	Su., W., F.,	278	834
HA856	Haneda – Honolulu	M., Tu., Th., Sa.	278	1,112
<b>Japan Airlines (7)</b>				
JL770	Narita – Kona	Daily	199	1,393
JL780	Narita – Honolulu	Daily	239	1,673
JL782	Narita – Honolulu	Daily	239	1,673
JL784	Narita – Honolulu	Daily	199	1,393
JL786	Narita – Honolulu	Daily	199	1,393
JL792	Kansai – Honolulu	Daily	239	1,673
JL794	Nagoya – Honolulu	Daily	239	1,673
<b>Korean Air (1)</b>				
KE001	Narita – Honolulu	Daily	276	1,932
<b>All Nippon Airways (3)</b>				
NH182	Narita – Honolulu	Daily (Su. Tu. F. with Airbus A380)	264 / 520	2,616
NH184	Narita – Honolulu	Daily	520	3,640
NH186	Haneda – Honolulu	Daily	246	1,722
<b>United Airlines (1)</b>				
UA902	Narita – Honolulu	Daily	269	1,883
<b>Grand Total (23)</b>			<b>6,126 / 6,382</b>	<b>39,308</b>

# Airlift Forecast

2020 February to April

Area	2020	2019	%Δ
Japan	513,749	490,554	4.7
Fukuoka	14,456	14,464	-0.1
Nagoya	35,316	35,735	-1.2
Osaka	94,286	124,372	-24.2
Sapporo	10,564	11,954	-11.6
Haneda	104,010	71,378	45.7
Narita	255,117	232,651	9.7

# YOY Overall Comparison

(2020 January)



	Total		
January	2020	2019	%Δ
Flights	664	699	↓ -5.0%
Arrivals	158,673	146,743	↑ 8.1%
Capacity	174,286	174,385	↘ -0.1%
Load Factor	91.0%	84.1%	↑ 8.2%

# YOY Overall Comparison

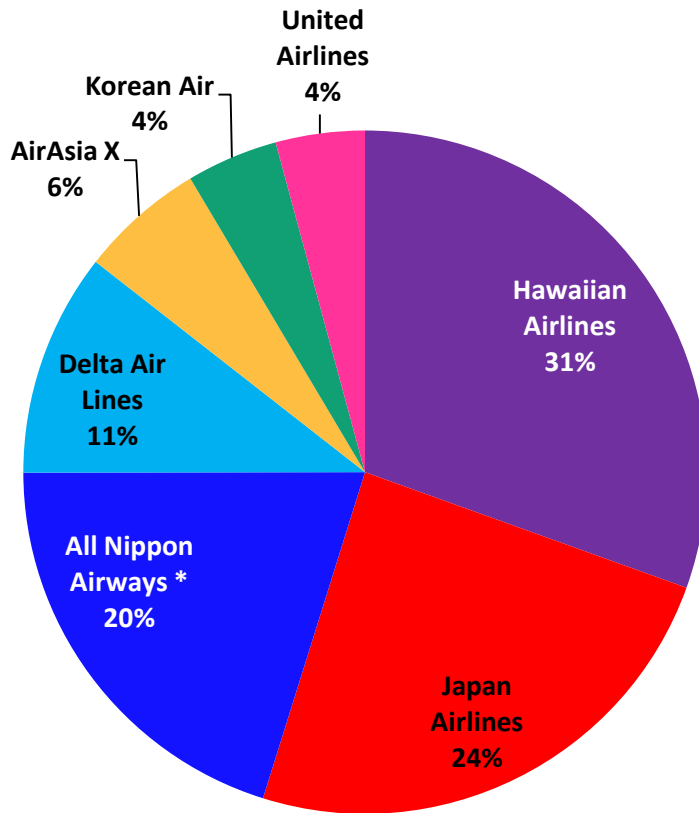
(2019 December YTD)



	Total		
YTD	2019	2018	%Δ
Flights	7,715	8,236	↓ -6.3%
Arrivals	1,823,498	1,807,066	→ 0.9%
Capacity	1,997,385	2,040,636	↓ -2.1%
Load Factor	91.3%	88.6%	↑ 3.1%

# Daily Air Seat Distribution (Airlines)

(2020 January)



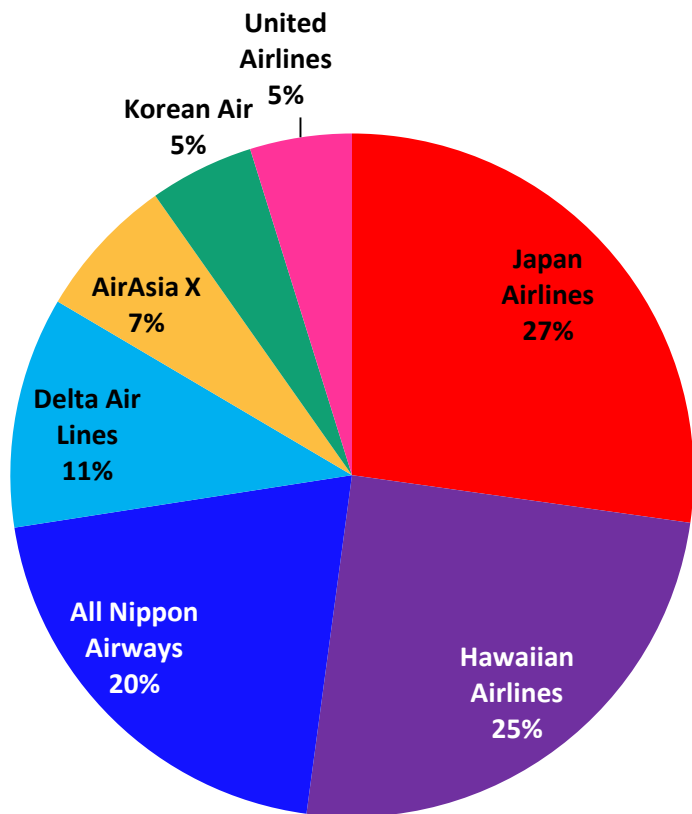
Airline Carrier	Air Seat Distribution
Hawaiian Airlines	1,946
Japan Airlines	1,553
All Nippon Airways	1,030 / 1,286
Delta Air Lines	675
AirAsia X	377
Korean Air	276
United Airlines	269
<b>Total</b>	<b>6,126 / 6,382</b>

\*ANA distribution is based on Airbus A380 values

Source: State of Hawaii Visitor Information Program & Flightaware.com

# Weekly Air Seat Distribution (Airlines)

(2020 January)

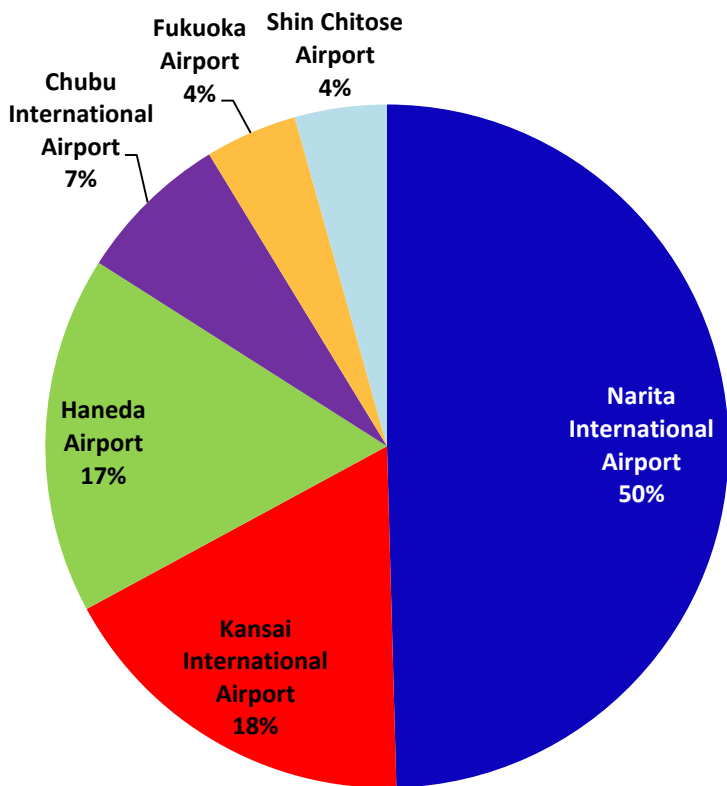


Airline Carrier	Air Seat Distribution
Japan Airlines	10,871
Hawaiian Airlines	9,730
All Nippon Airways	7,978
Delta Air Lines	4,275
Air Asia X	2,639
Korean Air	1,932
United Airlines	1,883
<b>Total</b>	<b>39,308</b>



# Daily Air Seat Distribution (Airport)

(2020 January)



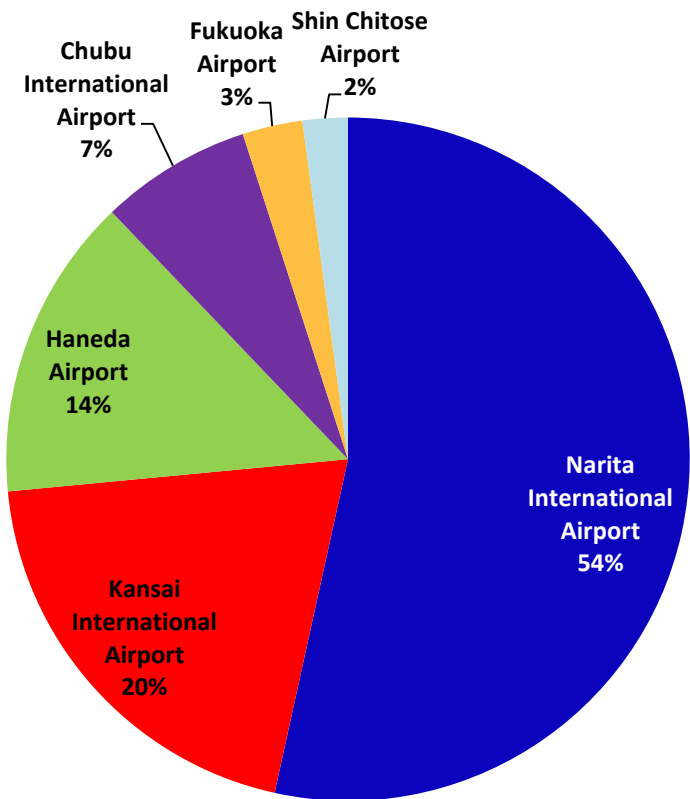
Airport	Air Seat Distribution
<b>Narita International Airport</b>	<b>2,907 / 3,163</b>
<b>Kansai International Airport</b>	<b>1,119</b>
<b>Haneda Airport</b>	<b>1,080</b>
<b>Chubu International Airport</b>	<b>464</b>
<b>Fukuoka Airport</b>	<b>278</b>
<b>Shin Chitose Airport</b>	<b>278</b>
<b>Total</b>	<b>6,126 / 6,382</b>

\*Narita distribution is based on Airbus A380 values

Source: State of Hawaii Visitor Information Program & Flightaware.com

# Weekly Air Seat Distribution (Airport)

(2020 January)



Airport	Air Seat Distribution
Narita International Airport	21,117
Kansai International Airport	7,833
Haneda Airport	5,614
Chubu International Airport	2,798
Fukuoka Airport	1,112
Shin Chitose Airport	834
<b>Total</b>	<b>39,308</b>

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# JAPAN HAWAII DIRECT ROUTE DATA: BY AIRPORT

# Load Factor by Airport Summarized

(2020 January)

	Airport Code	Flights	Arrivals	Capacity	Load Factor
<b>Haneda International Airport</b>	HND	93	23,563	24,862	94.8%
<b>Narita International Airport</b>	NRT	348	85,347	93,308	91.5%
<b>Tokyo</b>	HND & NRT	441	108,910	118,170	92.2%
<b>Kansai International Airport</b>	KIX	131	31,522	34,689	90.9%
<b>Chubu Airport</b>	NGO	57	10,532	12,809	82.2%
<b>All Major Ports of Departure</b>	Total	664	158,673	174,286	91.0%

# Load Factor by Airport Summarized

(2019 December YTD)

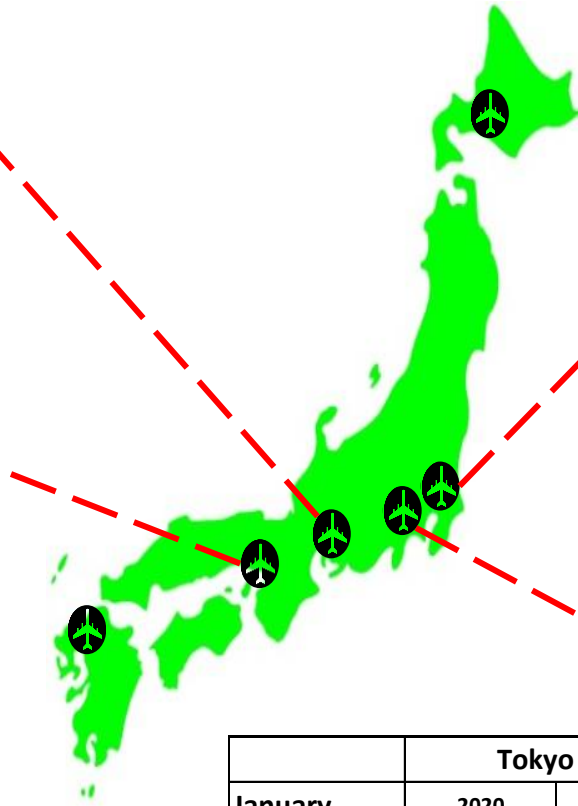
	Airport Code	Flights	Arrivals	Capacity	Load Factor
<b>Haneda International Airport</b>	HND	1,094	274,659	292,452	93.9%
<b>Narita International Airport</b>	NRT	4,066	949,784	1,036,504	91.6%
<b>Tokyo</b>	HND & NRT	5,160	1,224,443	1,328,956	92.1%
<b>Kansai International Airport</b>	KIX	1,594	394,488	440,135	89.6%
<b>Chubu Airport</b>	NGO	666	139,259	154,809	90.0%
<b>All Major Ports of Departure</b>	Total	7,715	1,823,498	1,997,385	91.3%

# YOY Comparison Breakdown by Airport

## (2020 January)

Chubu International Airport			
January	2020	2019	%Δ
Flights	57	56	↑ 1.8%
Arrivals	10,532	10,417	↑ 1.1%
Capacity	12,809	13,019	↓ -1.6%
Load Factor	82.2%	80.0%	↑ 2.8%

Kansai International Airport			
January	2020	2019	%Δ
Flights	131	169	↓ -22.5%
Arrivals	31,522	37,743	↓ -16.5%
Capacity	34,689	45,748	↓ -24.2%
Load Factor	90.9%	82.5%	↑ 10.1%



Narita International Airport			
January	2020	2019	%Δ
Flights	348	343	↑ 1.5%
Arrivals	85,347	68,825	↑ 24.0%
Capacity	93,308	81,689	↑ 14.2%
Load Factor	91.5%	84.3%	↑ 8.6%

Haneda International Airport			
January	2020	2019	%Δ
Flights	93	94	↓ -1.1%
Arrivals	23,563	22,204	↑ 6.1%
Capacity	24,862	25,140	↓ -1.1%
Load Factor	94.8%	88.3%	↑ 7.3%

Tokyo (HND & NRT)			
January	2020	2019	%Δ
Flights	441	437	→ 0.9%
Arrivals	108,910	91,029	↑ 19.6%
Capacity	118,170	106,829	↑ 10.6%
Load Factor	92.2%	85.2%	↑ 8.2%

# YOY Comparison Breakdown by Airport

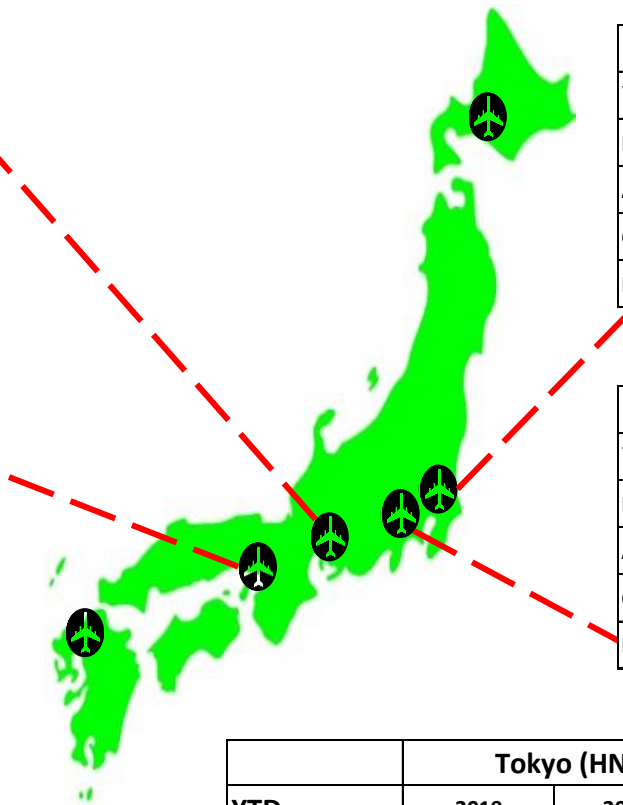
(2019 December YTD)

Chubu International Airport			
YTD	2019	2018	%Δ
Flights	666	675 ↓	-1.3%
Arrivals	139,259	138,644 →	0.4%
Capacity	154,809	154,858 ↘	0.0%
Load Factor	90.0%	89.5% →	0.5%

Kansai International Airport			
YTD	2019	2018	%Δ
Flights	1,594	1,744 ↓	-8.6%
Arrivals	394,488	396,556 ↘	-0.5%
Capacity	440,135	469,130 ↓	-6.2%
Load Factor	89.6%	84.5% ↑	6.0%

Narita International Airport			
YTD	2019	2018	%Δ
Flights	4,066	4,265 ↓	-4.7%
Arrivals	949,784	903,626 ↑	5.1%
Capacity	1,036,504	1,011,562 ↑	2.5%
Load Factor	91.6%	89.3% ↑	2.6%

Haneda International Airport			
YTD	2019	2018	%Δ
Flights	1,094	1,103 ↘	-0.8%
Arrivals	274,659	274,222 →	0.2%
Capacity	292,452	294,623 ↘	-0.7%
Load Factor	93.9%	93.1% →	0.9%



Tokyo (HND & NRT)			
YTD	2019	2018	%Δ
Flights	5,160	5,368 ↓	-3.9%
Arrivals	1,224,443	1,177,848 ↑	4.0%
Capacity	1,328,956	1,306,185 ↑	1.7%
Load Factor	92.1%	90.2% ↑	2.2%