

Japan Market Statistics Update

2020 October Edition



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Market Overview

Market Conditions

<u>FX Rate</u>	2020 October	105.24 JPY / USD
<u>Unemployment</u>	2020 October	3.1%
<u>Fuel Surcharge</u>	2020 October	¥ 0

Japan Travel Market

<u>Inbound</u>	2020 October	27,400	2020 YTD	4.00 mil
<u>Outbound</u>	2020 October	31,049	2020 YTD	3.11 mil

Hawaii Travel Market (Japan)

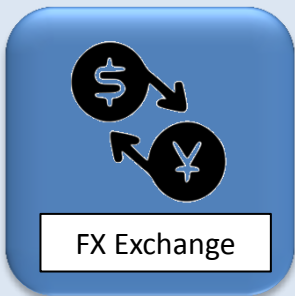
<u>Arrivals</u>	2020 October	183	2020 YTD	294,830
<u>Spending</u>	2020 October	N/A	2020 YTD	N/A

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JAPAN MARKET CONDITIONS

Japan Market Conditions: Economy

2020 October



FX Exchange

October High

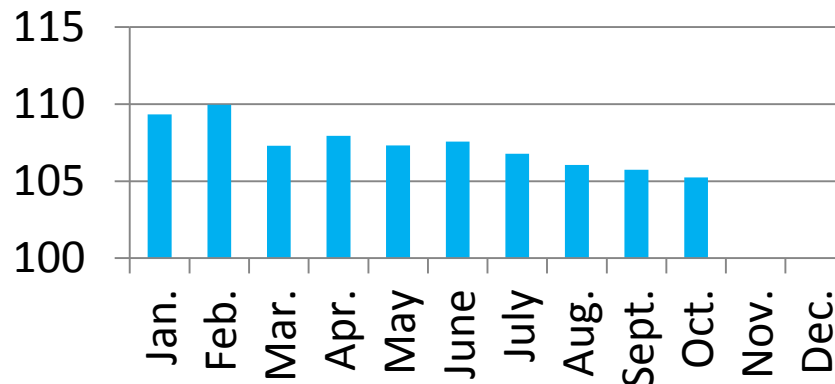
106.11

October Low

104.13

Source: Bank of Japan

2020 USD to JPY FX Rate



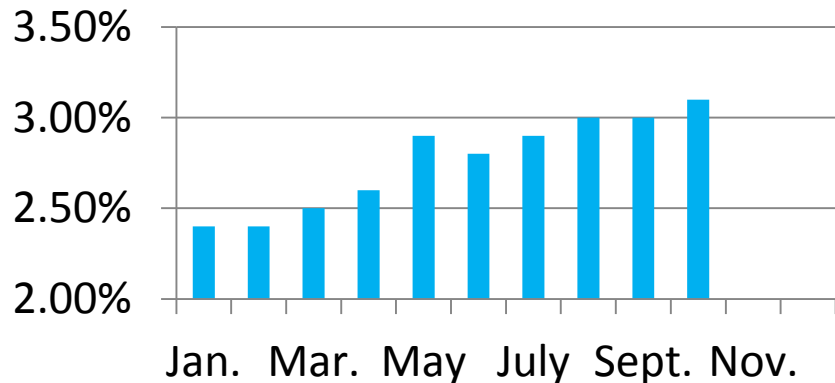
Unemployment

October Unemployment

3.1%

Source: Statistics Bureau of Japan

2020 Japan Unemployment



Japan Market Conditions: FSC

2020 October (Round-trip)



= ¥ 0



= ¥ 0



= ¥ 0



= ¥ 0



= ¥ 0



= ¥ 0

Source: Various Official Airline Websites

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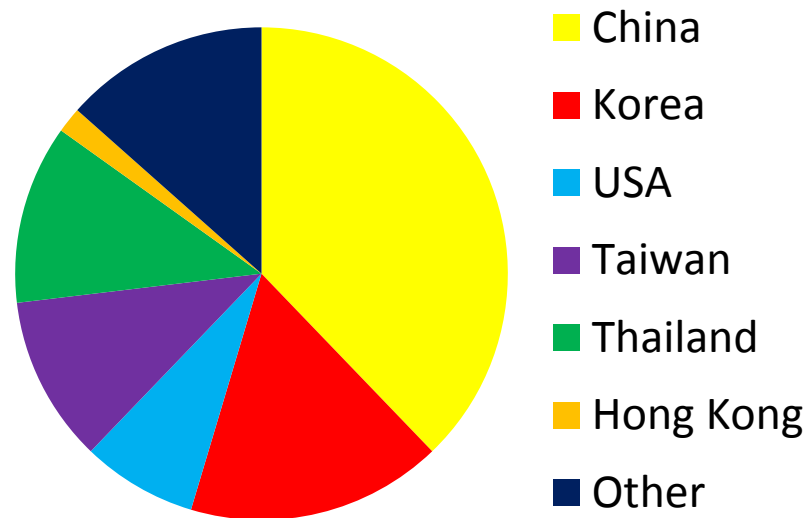
JAPAN INBOUND MARKET DATA

Japan Inbound Travel - Count

(2020 October)

	October 2020	October 2019	% Change
Total Japan Inbound	27,400	2,496,568	↓ -98.9%
China	4,500	730,631	↓ -99.4%
USA	900	153,363	↓ -99.4%
South Korea	2,000	197,281	↓ -99.0%
Taiwan	1,300	413,701	↓ -99.7%
Hong Kong	200	180,562	↓ -99.9%
Thailand	1,400	145,333	↓ -99.0%

Japan Inbound Travel October 2020

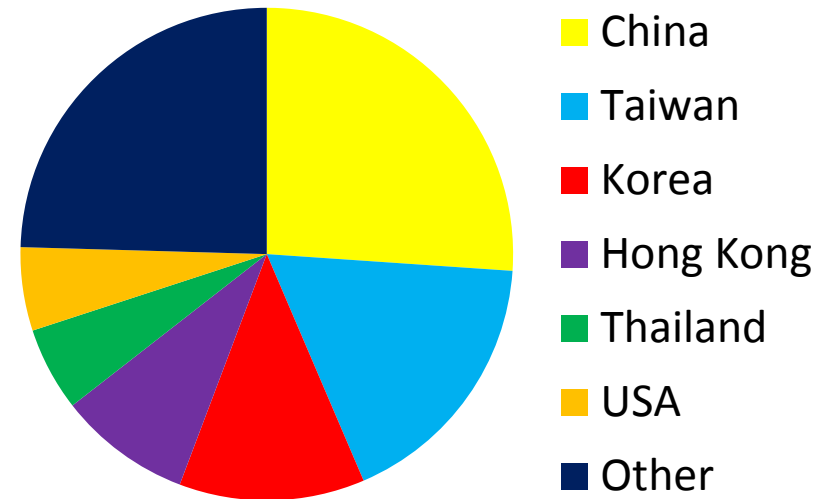


Japan Inbound Travel - Count

(2020 October YTD)

	2020 YTD	2019 YTD	% Change
Total Japan Inbound	4,000,554	26,914,388	↓ -85.1%
China	1,032,782	8,133,209	↓ -87.3%
Taiwan	692,351	4,150,231	↓ -83.3%
South Korea	482,210	5,131,596	↓ -90.6%
Hong Kong	345,259	1,841,448	↓ -81.3%
Thailand	218,159	1,013,776	↓ -78.5%
USA	216,806	1,430,370	↓ -84.8%

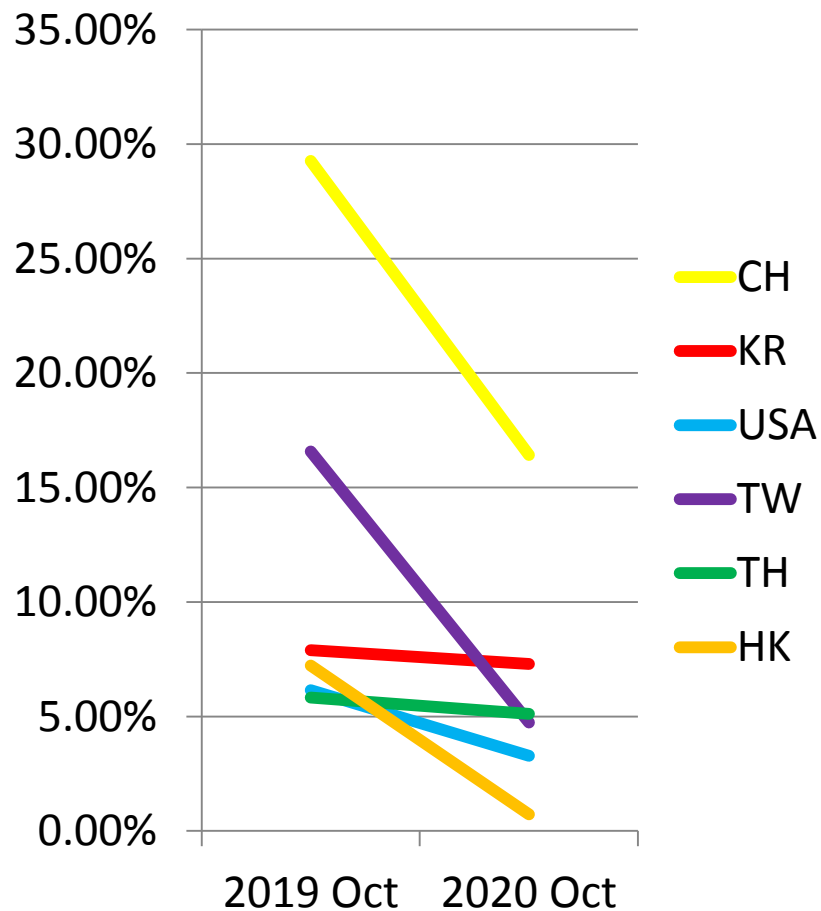
Japan Inbound Travel 2020



Japan Inbound Travel – Market Share

(2020 October)

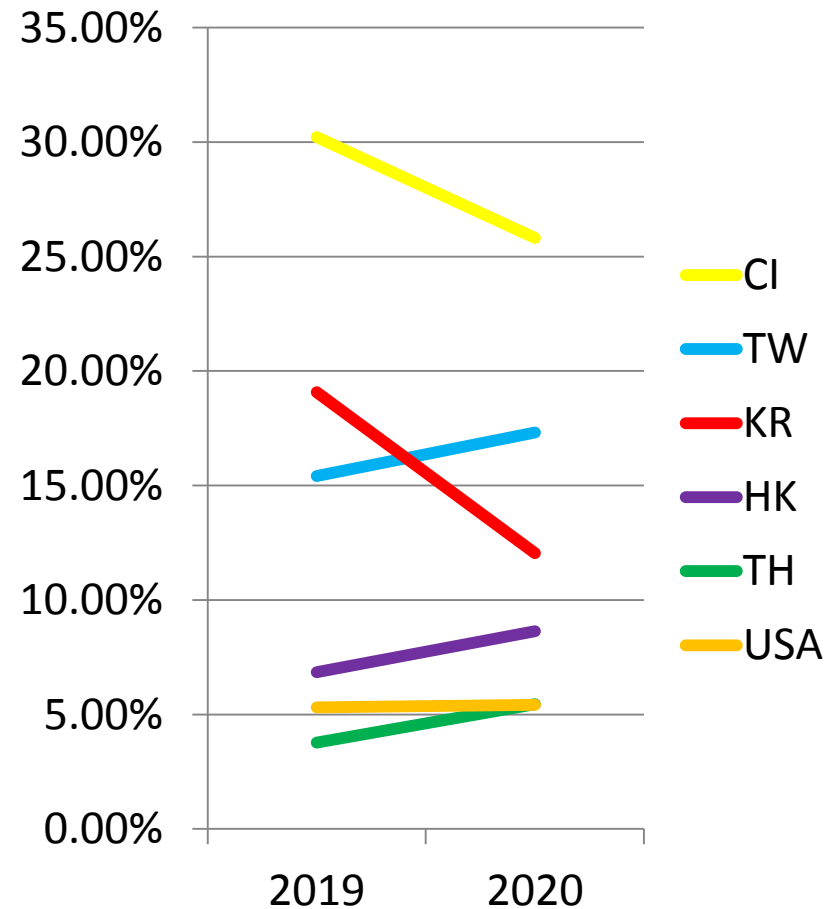
	2020 October Market Share	2019 October Market Share	Market Share Change
Total Japan Inbound			
China	16.42%	29.27%	↓ -12.8%
USA	3.28%	6.14%	↓ -2.9%
South Korea	7.30%	7.90%	↓ -0.6%
Taiwan	4.74%	16.57%	↓ -11.8%
Hong Kong	0.73%	7.23%	↓ -6.5%
Thailand	5.11%	5.82%	↓ -0.7%



Japan Inbound Travel – Market Share

(2020 October YTD)

	2020 YTD Market Share	2019 YTD Market Share	Market Share Change
Total Japan Inbound			
China	25.82%	30.22%	↓ -4.4%
Taiwan	17.31%	15.42%	↑ 1.9%
South Korea	12.05%	19.07%	↓ -7.0%
Hong Kong	8.63%	6.84%	↑ 1.8%
Thailand	5.45%	3.77%	↑ 1.7%
USA	5.42%	5.31%	→ 0.1%



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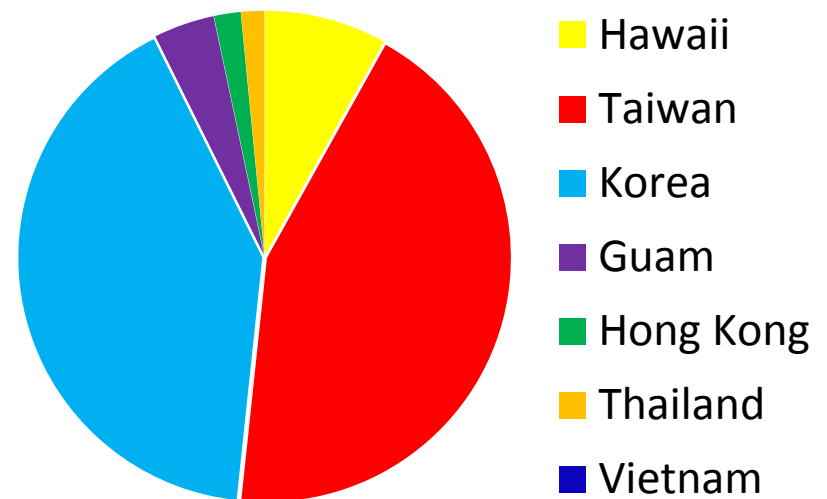
JAPAN OUTBOUND MARKET DATA

Japan Outbound Travel - Count

(2020 October)

	October 2020	October 2019	% Change
Total Japan Outbound	31,049	1,663,474	↓ -98.1%
Hawaii	183	134,557	↓ -99.9%
Korea	927	248,541	↓ -99.6%
Taiwan	986	207,000	↓ -99.5%
Guam	91	49,218	↓ -99.8%
Hong Kong	40	57,179	↓ -99.9%
Thailand	35	136,174	↓ -100.0%
Vietnam	N/A* ²	74,142	N/A* ²

Japan Outbound Travel October 2020



Note*: Data for China has been removed from the graph due to the lack of available data

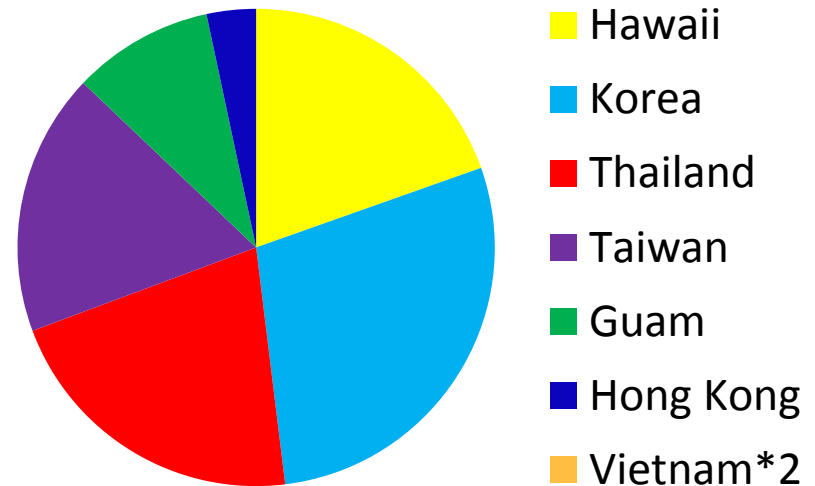
Note *2: Data for these countries in October were not released, making 2020 values unavailable

Japan Outbound Travel - Count

(2020 October YTD)

	2020 YTD	2019 YTD	% Change
Total Japan Outbound	3,110,485	16,726,015	↓ -81.4%
Hawaii	294,830	1,308,034	↓ -77.5%
Korea	428,537	2,757,828	↓ -84.5%
Thailand	320,133	1,487,409	↓ -78.5%
Taiwan	267,630	1,725,634	↓ -84.5%
Guam	143,864	553,219	↓ -74.0%
Hong Kong	50,282	975,336	↓ -94.8%
Vietnam	N/A* ²	786,674	N/A* ²

Japan Outbound Travel 2020



Note*: Data for China has been removed from the graph due to the lack of available data

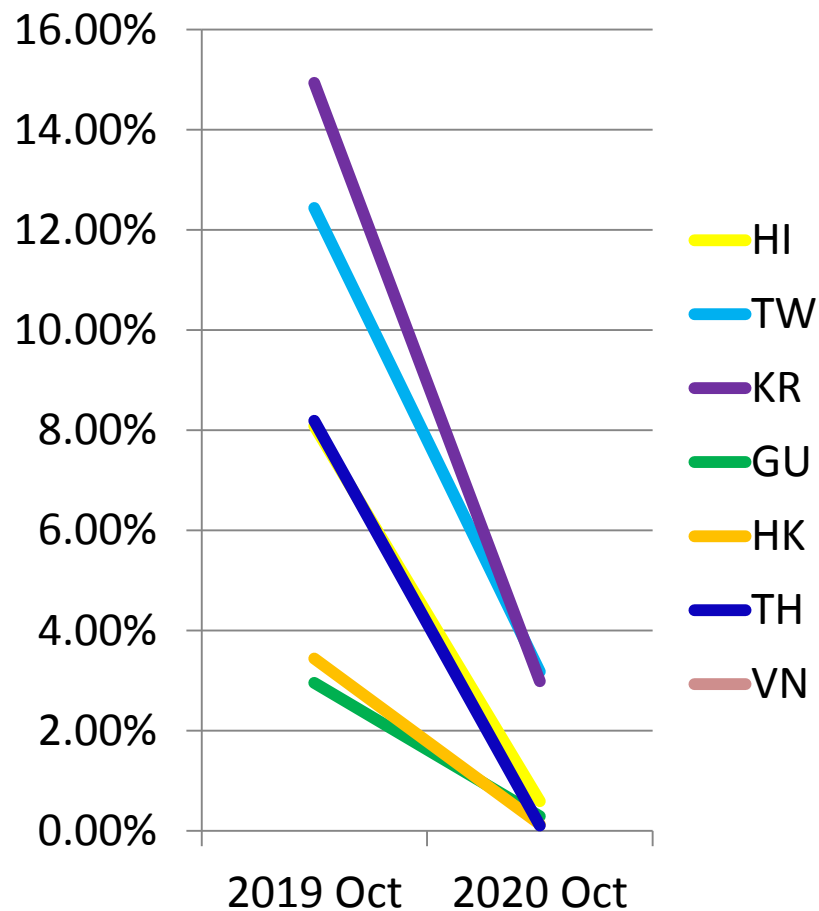
Note *²: Data for these countries in October were not released, making 2020 values unavailable

Source: Japan Tourism Marketing Co.

Japan Outbound Travel – Market Share

(2020 October)

	October 2020 Market Share	October 2019 Market Share	Market Share Change
Total Japan Outbound			
Hawaii	0.59%	8.09%	↓ -7.5%
Korea	2.99%	14.94%	↓ -12.0%
Taiwan	3.18%	12.44%	↓ -9.3%
Guam	0.29%	2.96%	↓ -2.7%
Hong Kong	0.13%	3.44%	↓ -3.3%
Thailand	0.11%	8.19%	↓ -8.1%
Vietnam	N/A* ²	4.46%	N/A* ²



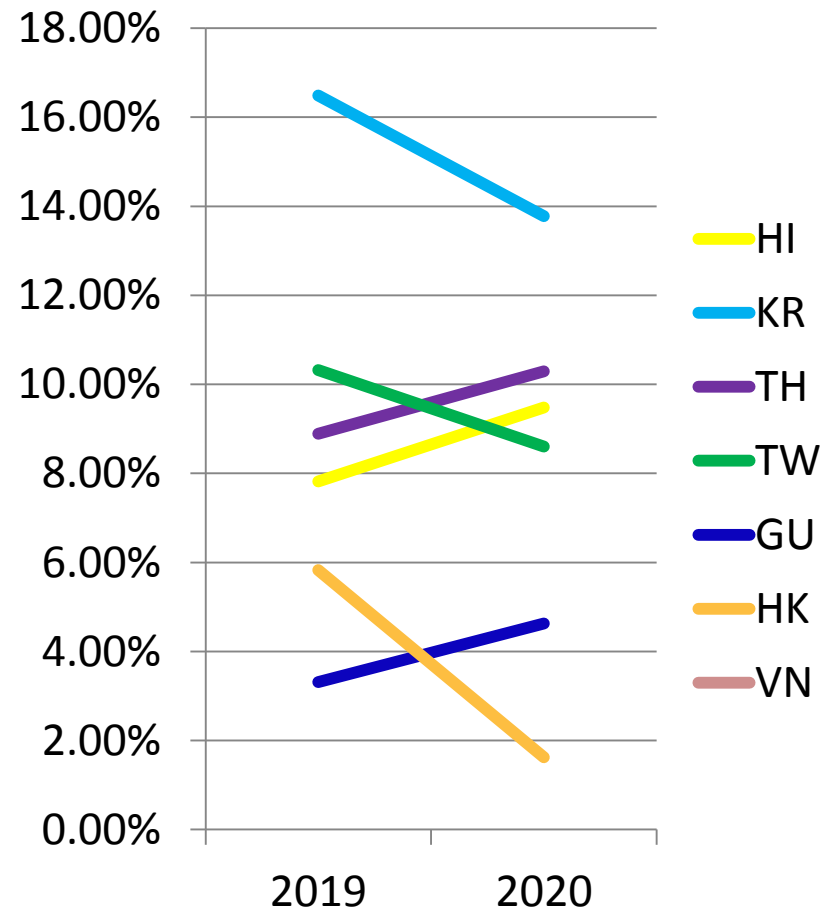
Note *²: Data for these countries in October were not released, making 2020 values unavailable

Source: Japan Tourism Marketing Co.

Japan Outbound Travel – Market Share

(2020 October YTD)

	2020 YTD Market Share	2019 YTD Market Share	Market Share Change
Total Japan Outbound			
Hawaii	9.48%	7.82%	↑ 1.7%
Korea	13.78%	16.49%	↓ -2.7%
Thailand	10.29%	8.89%	↑ 1.4%
Taiwan	8.60%	10.32%	↓ -1.7%
Guam	4.63%	3.31%	↑ 1.3%
Hong Kong	1.62%	5.83%	↓ -4.2%
Vietnam	N/A* ²	4.70%	N/A* ²



Note *²: Data for these countries in October were not released, making 2020 values unavailable

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JAPAN VISITOR TO HAWAII DATA

Japan Visitors to Hawaii

(2020 October)

2020 October				Spending Value unavailable for April – October 2020	2020 YTD			
Japanese Visitor Statistics	October 2020	2019	Δ 2019		Japanese Visitor Statistics	2020	2019	Δ 2019
Visitor Arrivals	183	134,557	↓ -99.9%		Visitor Arrivals	294,830	1,308,034	↓ -77.5%
Visitor Spending (\$mil.)	N/A	195.7	N/A		Visitor Spending (\$mil.)	N/A	1,848.1	N/A
Daily Spend (\$pppd)	N/A	249.9	N/A		Daily Spend (\$pppd)	N/A	237.8	N/A
Airlift (scheduled seats)	2,254	166,311	↓ -98.6%		Airlift (scheduled seats)	469,256	1,664,725	↓ -71.8%

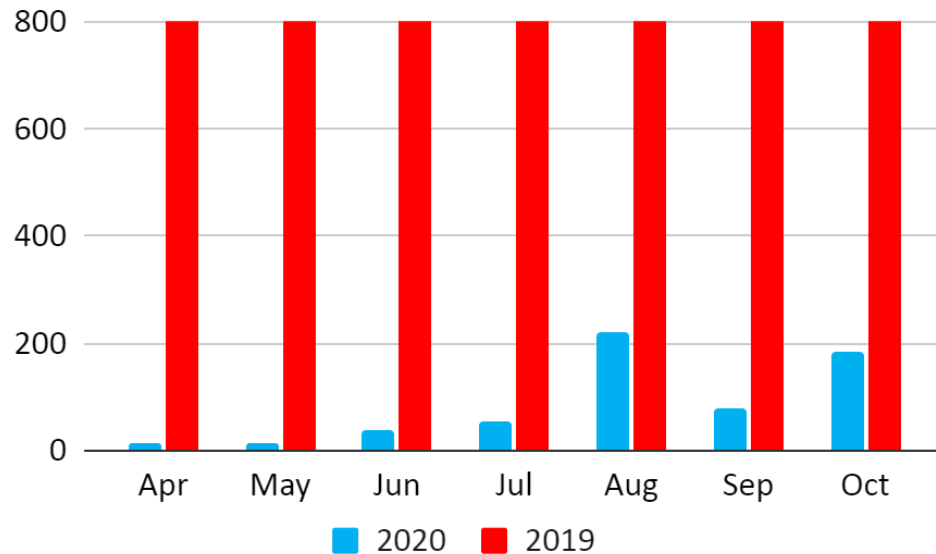
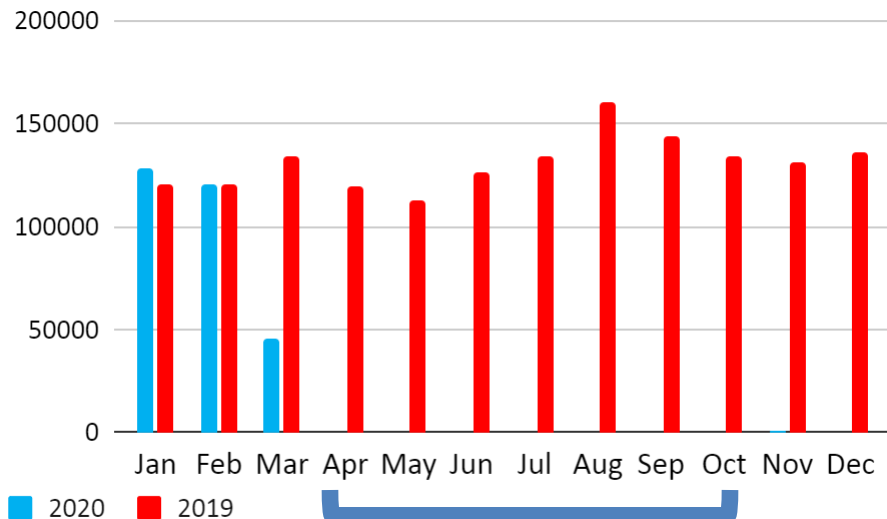
Island Distribution	October 2020	2019	Δ 2019
Oahu	159	127,523	↓ -99.9%
Maui	17	3,675	↓ -99.5%
Molokai	-	183	↓ -100.0%
Lanai	-	368	↓ -100.0%
Kauai	1	2,871	↓ -100.0%
Hawaii Island	6	16,165	↓ -100.0%

Island Distribution	2020	2019	Δ 2019
Oahu	275,064	1,239,270	↓ -77.8%
Maui	8,155	40,655	↓ -79.9%
Molokai	421	1,529	↓ -72.4%
Lanai	133	2,022	↓ -93.4%
Kauai	3,711	21,446	↓ -82.7%
Hawaii Island	35,917	139,580	↓ -74.3%

Japan Visitors to Hawaii: Arrivals

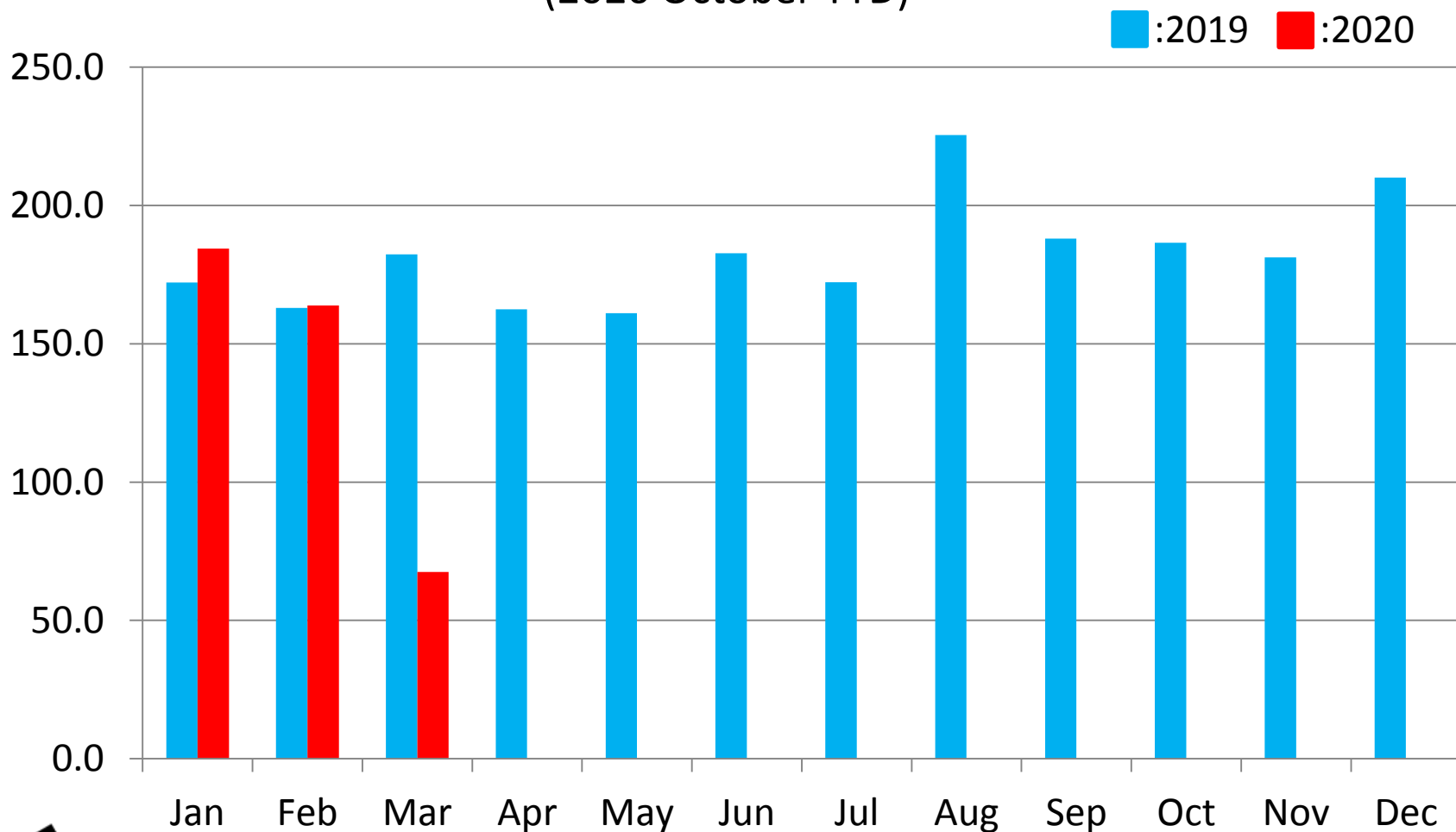
(2020 October YTD)

	2020	2019	%
January	128,686	120,418	6.87%
February	120,210	120,653	-0.37%
March	45,332	133,858	-66.13%
April	13	119,487	-99.99%
May	14	113,226	-99.99%
June	40	126,592	-99.97%
July	54	134,587	-99.96%
August	220	160,728	-99.86%
September	79	143,928	-99.95%
October	183	134,557	-99.86%
November		131,536	
December		136,635	
October YTD	294,830	1,308,034	-77.5%



Japan Visitors to Hawaii: Spending (\$mil)

(2020 October YTD)

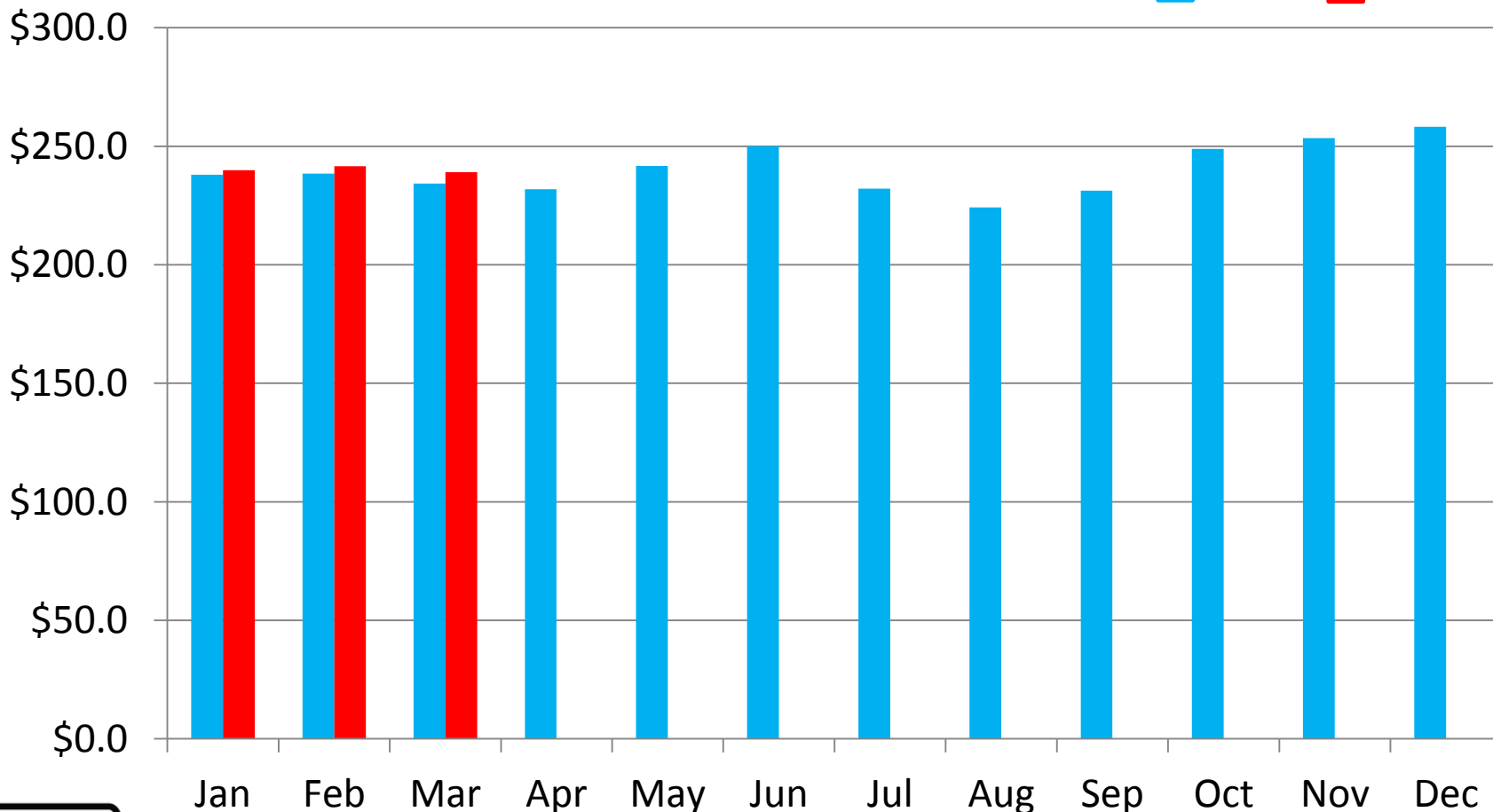


Spending (\$mil)	2020	2019	Δ 2019
October	Unavailable	\$195.7	N/A
YTD	\$415.7	\$1,848.1	-77.5%

Japan Visitors to Hawaii: Daily Spending

(2020 October YTD)

■:2019 ■:2020

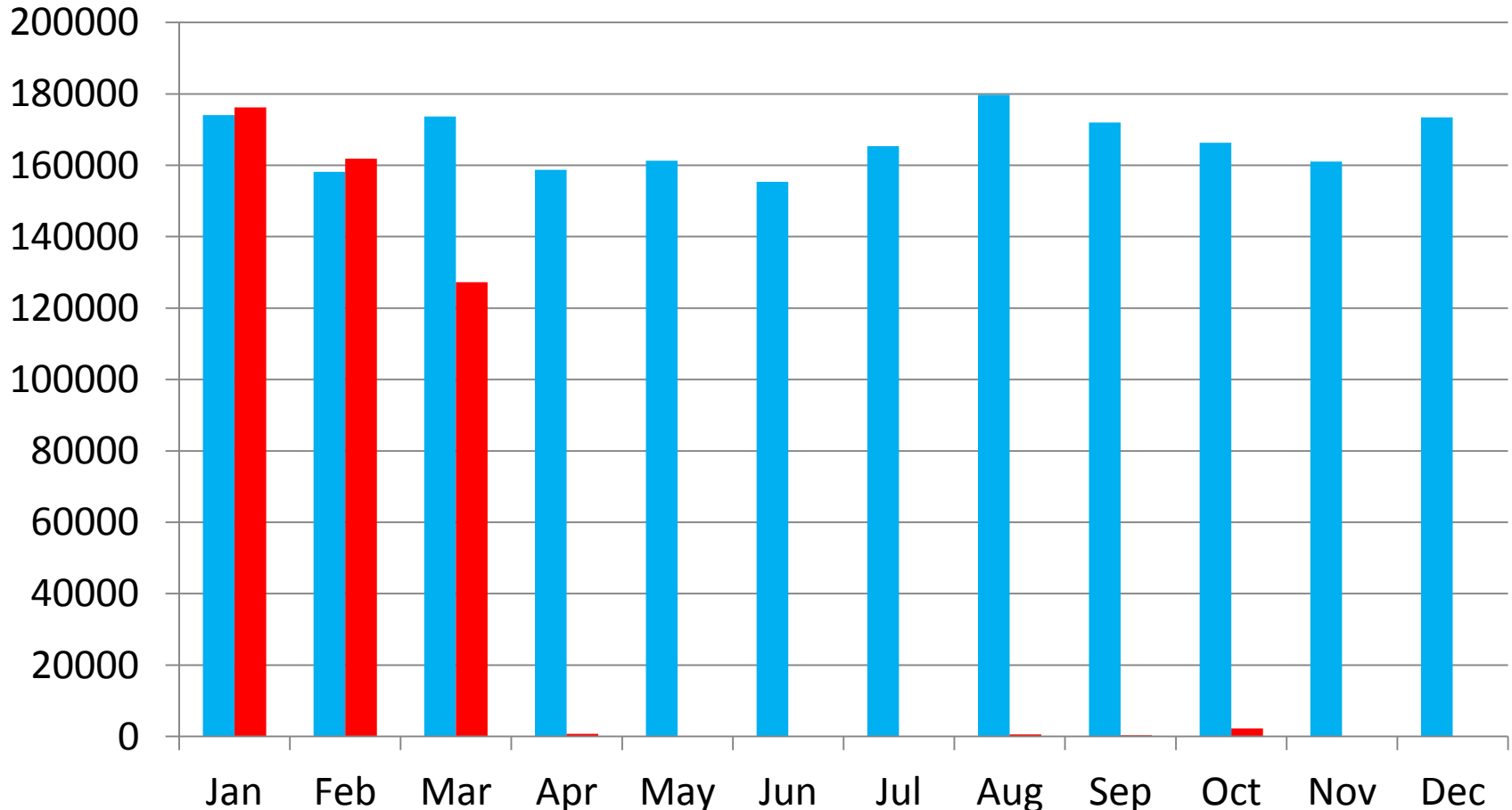


Daily Spending	2020	2019	Δ 2019
October	Unavailable	\$249.9	N/A
YTD	\$240.2	\$238.9	0.5%

Japan Visitors to Hawaii: Airlift

(2020 October YTD)

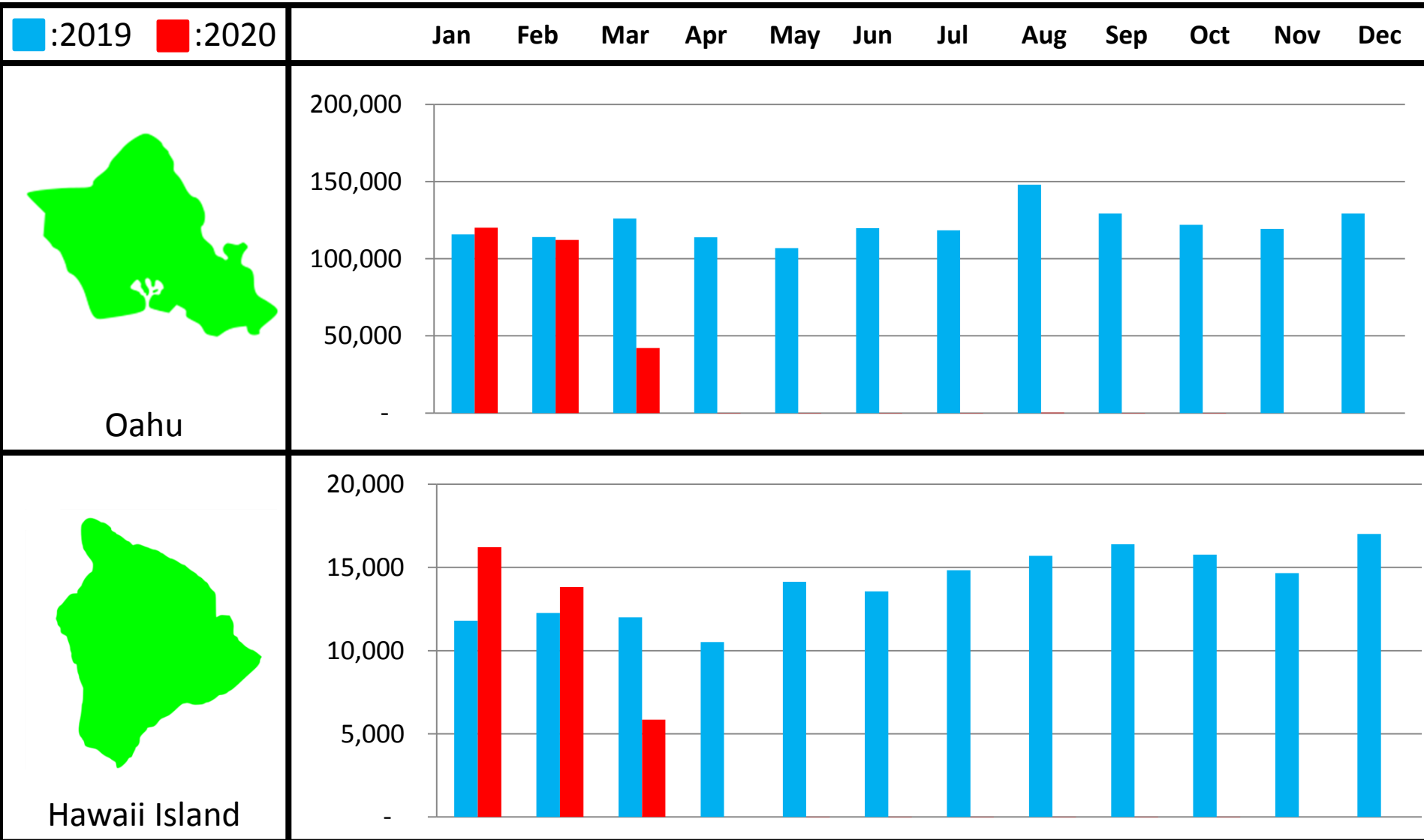
■:2019 ■:2020



Airlift	2020	2019	Δ 2019
October	2,254	166,311	-98.6%
YTD	469,256	1,664,725	-71.8%

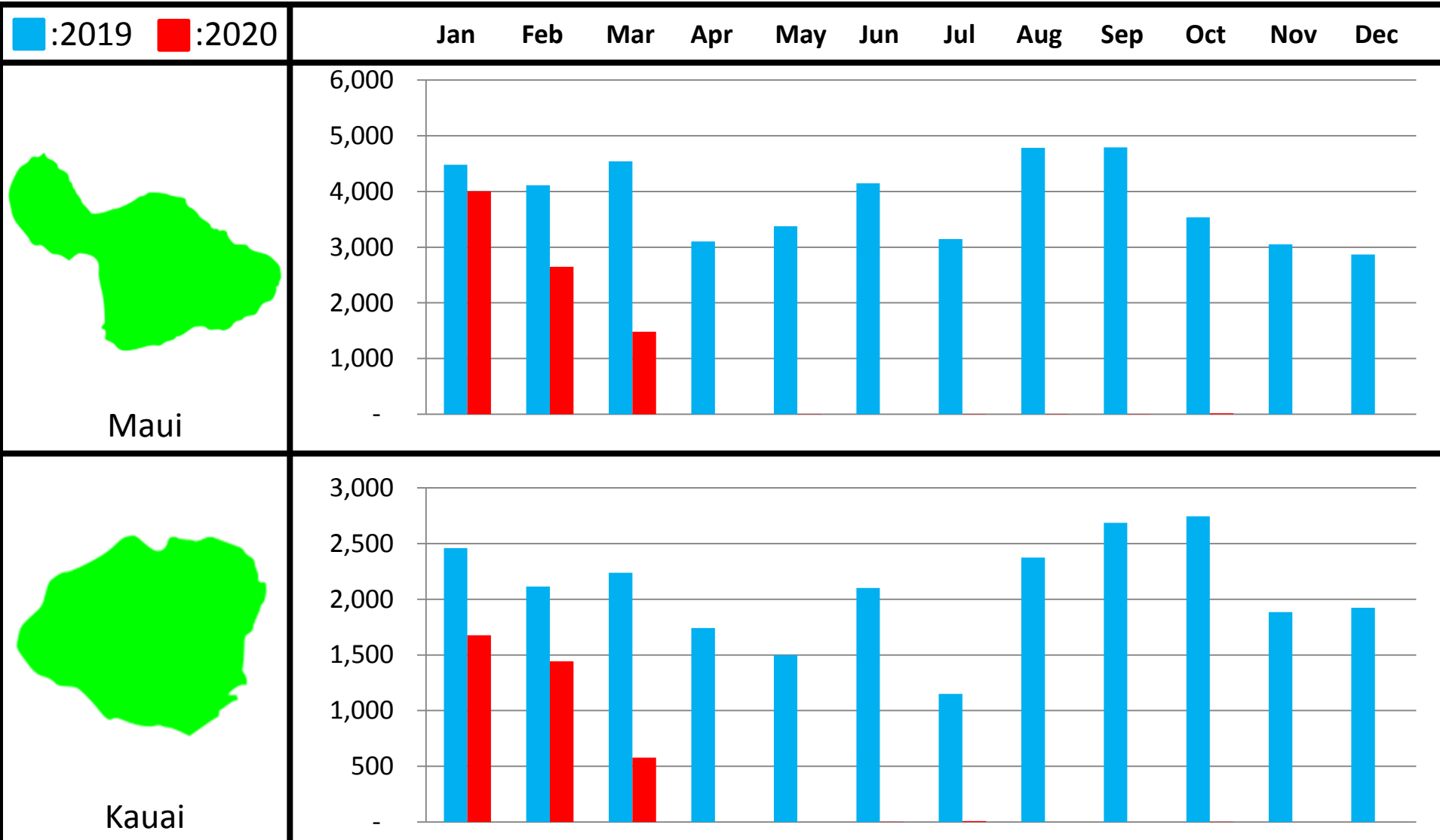
Japan Visitors Island Breakdown

(2020 October YTD)



Japan Visitors Island Breakdown

(2020 October YTD)



Japan Visitors to Hawaii: Profile

October 2020 (Market Share)



= 85.7%

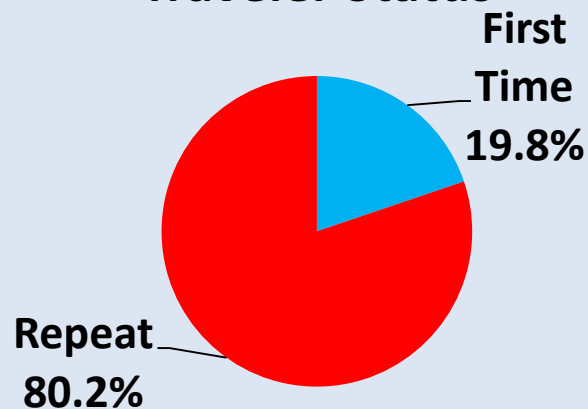


= 4.8%

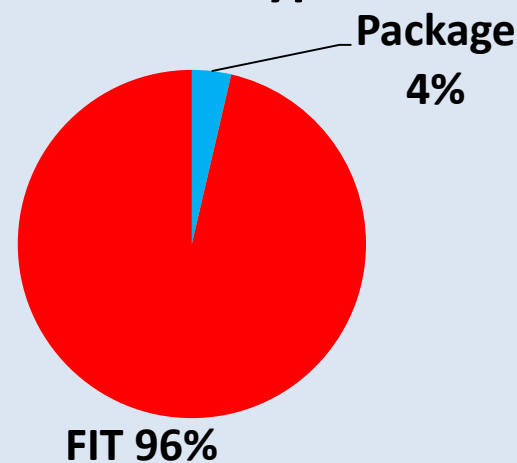


= 9.5%

Traveler Status



Traveler Type



Japan Visitors to Hawaii: Profile

2020 YTD (Market Share)



= 82.7%

Leisure



= 10.3%

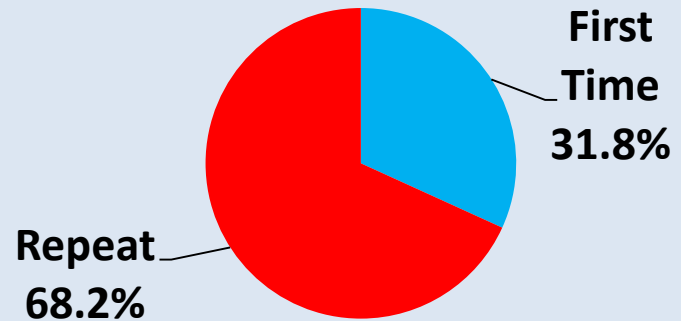
Romance



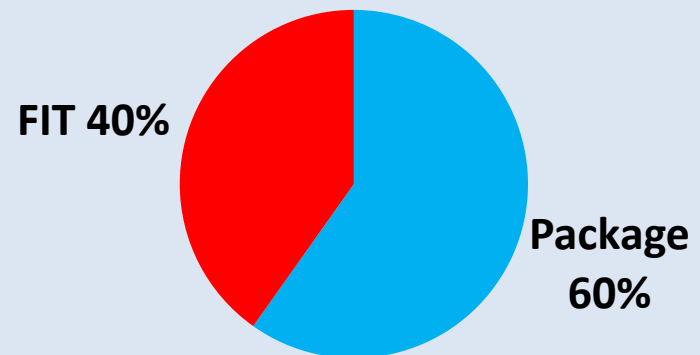
= 7.0%

MICE

Traveler Status



Traveler Type



Japan Visitors to Hawaii: Profile

October 2020

Travel Reason	2020	2019	%Δ
Honeymoon/Get Married	2	20,564	-100.0%
Pleasure/Vacation	36	90,612	-100.0%
MICE	4	9,579	-100.0%

Travel Status	2020	2019	%Δ
First Time Traveler	19.8%	34.3%	-14.5%
Repeat Traveler	80.2%	65.7%	+14.5%

Travel Type	2020	2019	%Δ
Package Trip	2	83,062	-100.0%
True Independent	53	45,823	-99.9%

Japan Visitors to Hawaii: Profile

2020 YTD

Travel Reason	2020	2019	%Δ
Honeymoon/Get Married	28,273	164,331	-82.8%
Pleasure/Vacation	227,276	983,707	-76.9%
MICE	19,320	70,372	-72.5%

Travel Status	2020	2019	%Δ
First Time Traveler	31.8%	31.7%	+0.2%
Repeat Traveler	68.2%	68.3%	-0.2%

Travel Type	2020	2019	%Δ
Package Trip	168,953	760,871	-77.8%
True Independent	113,526	497,817	-77.2%

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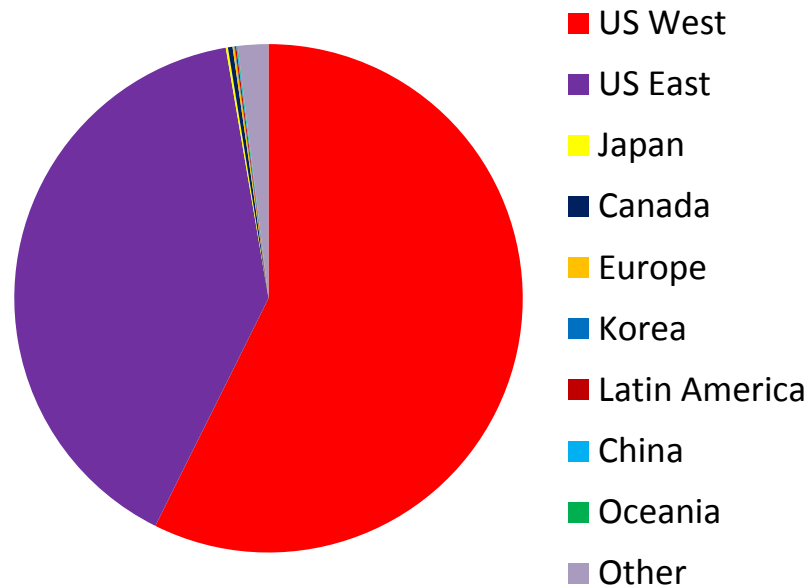
HAWAII INBOUND MARKET DATA BY AIR

Hawaii Inbound Travel Data by air – count

(2020 October)

	October 2020	October 2019	% Change
Total Hawaii Inbound	76,613	775,675	↓ -90.1%
US West	53,396	354,007	↓ -84.9%
US East	19,582	148,075	↓ -86.8%
Japan	183	134,557	↓ -99.9%
Latin America	117	2,062	↓ -94.3%
Canada	389	32,250	↓ -98.8%
Europe	152	14,892	↓ -99.0%
Oceania	55	33,174	↓ -99.8%
China	72	5,039	↓ -98.6%
Korea	45	20,261	↓ -99.8%
Other	2,584	28,919	↓ -91.1%

Visitor Arrivals October 2020

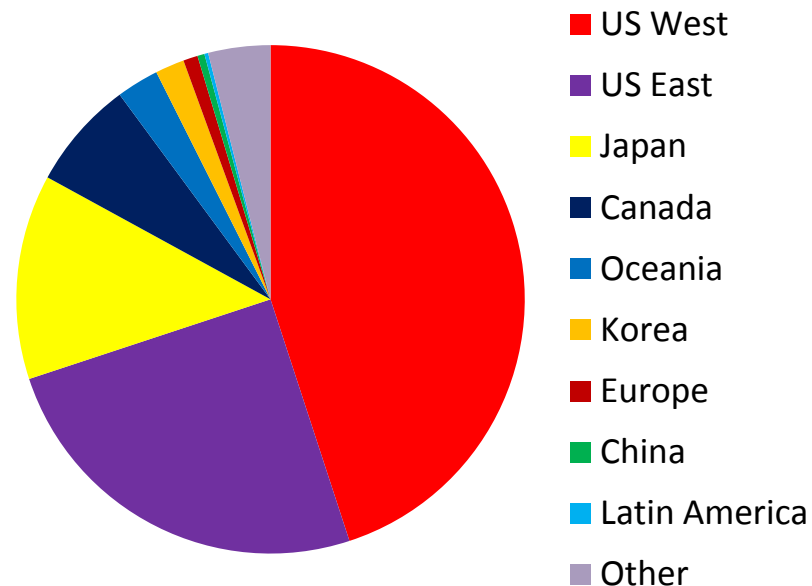


Hawaii Inbound Travel Data by air – count

(2020 October YTD)

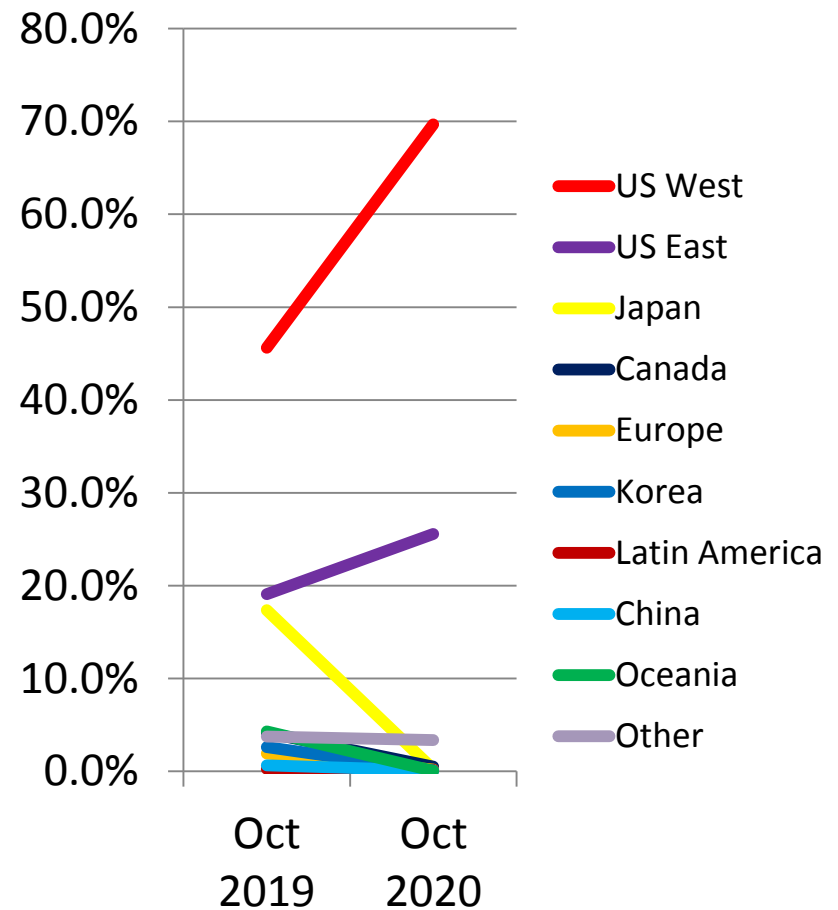
	2020 YTD	2019 YTD	% Change
Total Hawaii Inbound	2,266,830	8,509,490	↓ -73.4%
US West	1,016,948	3,801,555	↓ -73.2%
US East	564,318	1,910,777	↓ -70.5%
Japan	294,830	1,308,034	↓ -77.5%
Canada	156,566	425,324	↓ -63.2%
Oceania	60,989	311,704	↓ -80.4%
Korea	41,863	185,951	↓ -77.5%
Europe	20,868	118,559	↓ -82.4%
China	10,160	80,844	↓ -87.4%
Latin America	5,471	21,484	↓ -74.5%
Other	89,304	315,921	↓ -71.7%

Visitor Arrivals 2020



Hawaii Inbound Travel Data by air – market share (2020 October)

	2020 Market Share	2019 Market Share	Change Market Share
Total Hawaii Inbound			
US West	69.70%	45.64%	↑ 24.1%
US East	25.56%	19.09%	↑ 6.5%
Japan	0.24%	17.35%	↓ -17.1%
Latin America	0.15%	0.27%	↓ -0.1%
Canada	0.51%	4.16%	↓ -3.6%
Europe	0.20%	1.92%	↓ -1.7%
Oceania	0.07%	4.28%	↓ -4.2%
China	0.09%	0.65%	↓ -0.6%
Korea	0.06%	2.61%	↓ -2.6%
Other	3.37%	3.73%	↓ -0.4%



Hawaii Inbound Travel Data by air – market share (2020 October YTD)

	2020 Market Share	2019 Market Share	Change Market Share
Total Hawaii Inbound			
US West	44.86%	44.67%	→ 0.2%
US East	24.89%	22.45%	↑ 2.4%
Japan	13.01%	15.37%	↓ -2.4%
Canada	6.91%	5.00%	↑ 1.9%
Oceania	2.69%	3.66%	↓ -1.0%
Korea	1.85%	2.19%	↓ -0.3%
Europe	0.92%	1.39%	↓ -0.5%
China	0.45%	0.95%	↓ -0.5%
Latin America	0.24%	0.25%	↓ 0.0%
Other	3.94%	3.71%	→ 0.2%

