



HAWAII TOURISM

JAPAN

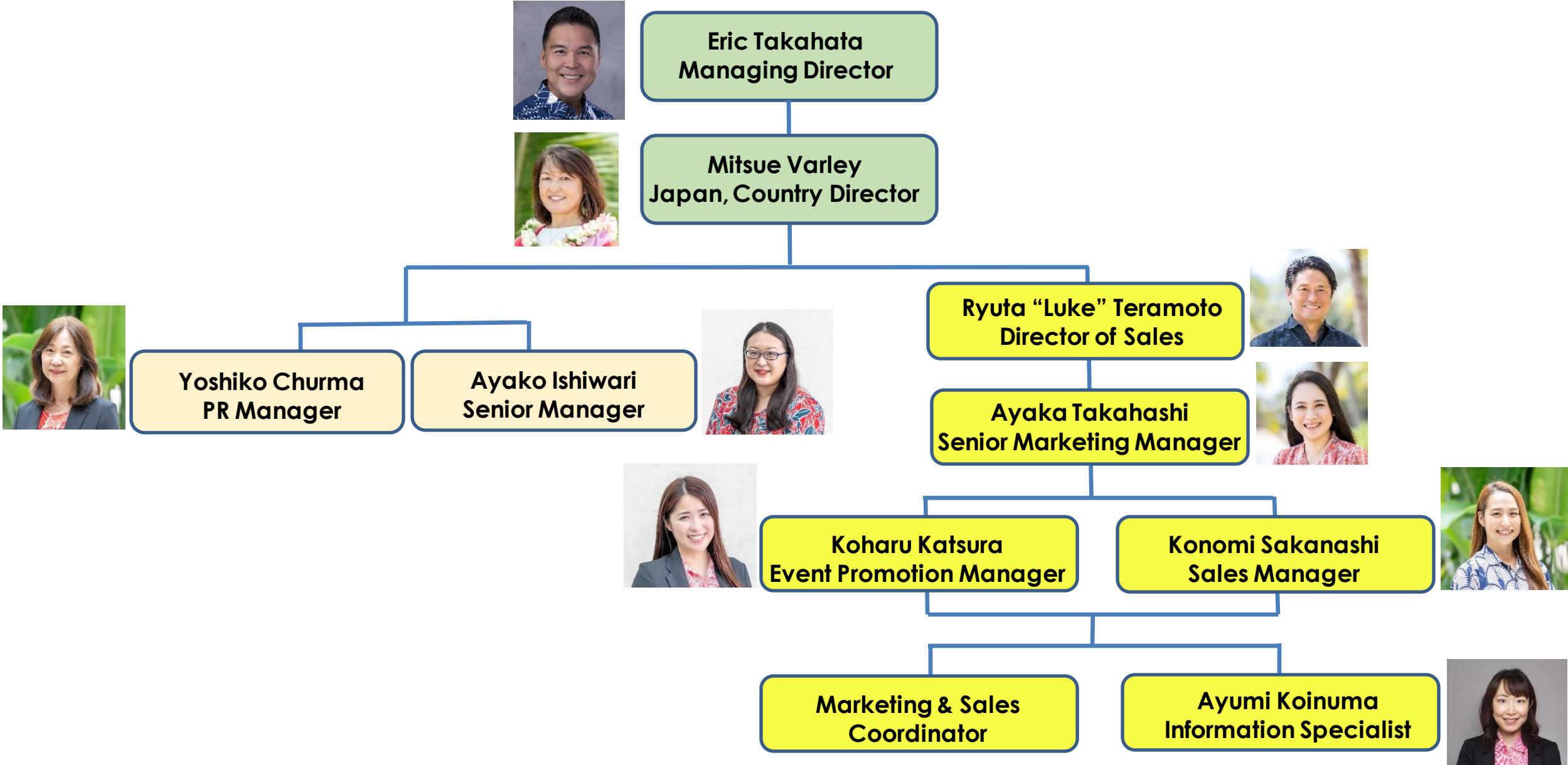
2024 HTA Spring Tourism Update

3.6.2024

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Managing Director

HAWAI'I TOURISM JAPAN



MARKET SITUATION



JAPAN VISITOR STATS

	2023	2022	2019	% vs. 2022	% vs. 2019
Expenditure (\$ Millions)	899.78	359.39	2,248.30	150.36%	-59.98%
Visitor arrivals	572,979	192,562	1,576,205	197.56%	-63.65%
Visitor days	3,767,157	1,526,608	9,306,767	146.77%	-59.52%
Length of stay (days)	6.57	7.93	5.90	-17.15%	11.36%
Per person per day (\$)	238.85	235.42	241.58	1.46%	-1.13%



MARKET SITUATION

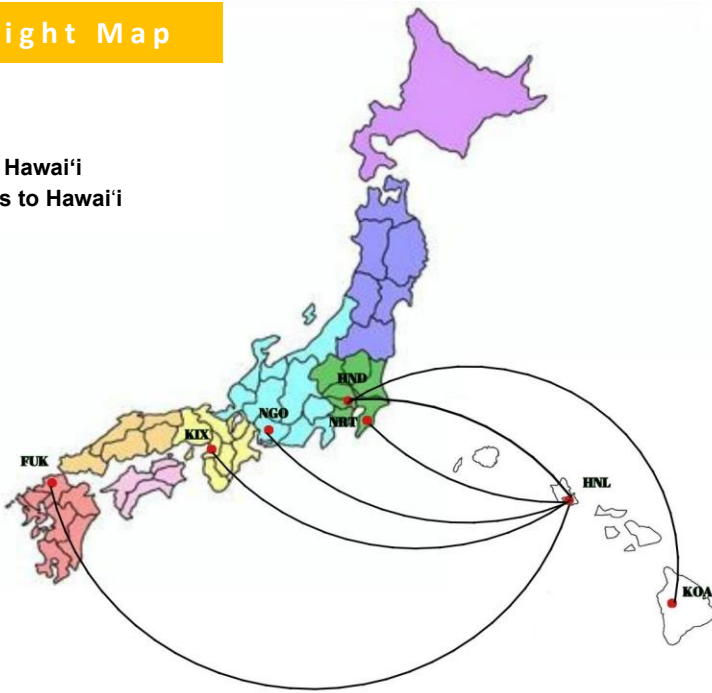
- Japan's core inflation in January dropped for the third straight month to hit its lowest level in 22 months
- January core consumer price index, rose 2% from a year earlier, a decline from a 2.3% gain in December
- Steady but slower than expected market recovery due to uncontrollable factors (40% of 2019)
 - JPY/USD exchange rate
 - U.S. inflation
 - High air fuel surcharges
 - Pricing sensitivity (Sentiment, value proposition)



OUTBOUND TRAVEL

- Estimated annual number of Japanese departures in 2023 was 9.62 million, 3.5 times higher than 2022, 50% recovery to 2019
- Japanese government continues to focus on promotions to drive outbound and overseas travels (e.g. JATA's Passport Campaign)
- Hawai'i remains top desired destination of choice

- Direct flights to Hawai'i
- Suspended direct flights to Hawai'i
- ▲ Suspended chartered flights to Hawai'i



AIR SEAT SYNOPSIS

Top 5 % Share by Area (2019)

Kanto/Narita/Haneda
Kinki/Kansai
Chubu/Nagoya
Kyushu/Fukuoka
Tohoku

	Flights			Seats		
	2024	2019	%Change	2024	2019	%Change
24-Mar	425	694	-38.8%	124,029	173,638	-28.6%
24-Apr	376	634	-40.7%	111,476	158,756	-29.8%
24-May	401	641	-37.4%	117,381	161,248	-27.2%
Total	1,202	1,969	-39.0%	352,886	493,642	-28.5%

PACKAGE COST COMPARISON

January 2024

Night	Hawai'i	Guam	Australia	Seoul	Taiwan	Bangkok	Paris
4NT	¥492,050	¥331,550	¥300,600	¥138,400	¥96,300	¥209,900	¥371,400
3NT	¥353,500	¥293,300	¥272,300	¥126,950	¥105,000	¥256,100	NA

February 2024

Night	Hawai'i	Guam	Australia	Seoul	Taiwan	Bangkok	Paris
4NT	¥327,000	¥267,750	¥297,050	¥111,200	¥117,050	¥149,100	¥363,000
3NT	¥289,300	¥242,150	¥276,975	¥99,100	¥112,700	¥147,300	NA





MARKETING STRATEGY

TARGET AUDIENCE



**Affluent
Traveler**



**Romantic
Couples**



**Experience
Seekers**



**Ethical
Younger
Generation**



**Multi
Generation
Family**

Mindful travelers with annual household incomes of \$75,000+ and total assets worth over \$1 million will be targeted in regions with direct flight access to Hawai'i



CORE BRAND MESSAGE

- Inspire a deep appreciation of Hawai'i's natural beauty, historical significance, cultural depth and local community under the Mālama Hawai'i initiative
- "Beautiful Hawai'i, travel can make the world beautiful" campaign is designed to change one's outlook on life through travel
- Pivot from Mālama to messaging that inspires and drives bookings to Hawai'i - "Yappari Hawai'i" campaign



STRATEGY

- Pursue a targeted segmentation approach focusing on mindful and high-value travelers in specific geographic regions to raise the quality of visitors to our state
- Implement strategy focused on stimulating demand during off-season periods with top wholesalers
- Ramp up interest to travel to the Hawaiian islands with a focus on island branding through owned and earned media channels
- Showcase Hawai'i's brand appeal over competing destinations

An aerial photograph of a rugged, green mountain range. The mountains are covered in dense green vegetation and have sharp, jagged peaks. In the background, a turquoise ocean meets a sandy beach. The text "MARKETING IMPLEMENTATION" is overlaid in the center of the image in a bold, white, sans-serif font. A thin white horizontal line is positioned below the text.

MARKETING IMPLEMENTATION



旅は、世界を美しくできる。

Beautiful Hawaii

NEW CAMPAIGN “YAPPARI HAWAI‘I” (It’s gotta be Hawai‘i!)



旅、はじめるなら
やっぱり
HAWAI‘I

The
HAWAIIAN
ISLANDS

おもいっきり、ご褒美はじめよう。
めいっぱい、親孝行はじめよう。
無制限で、青春はじめよう。
全力で、恋はじめよう。
すべて忘れて、自分磨きはじめよう。

食べて、遊んで、学んで、整えて。
取り戻すには十分すぎる、
色とりどりの体験がここにある。
誰にとっても、優雅で、開放的で、安心で、
非日常的な体験がここにある。

もう一度あの、眩いほどに輝ける
旅、はじめるなら、やっぱりハワイ。



ADVERTISING / DIGITAL MARKETING

- Distribute through TV, outdoor, taxi signage, newspaper, consumer magazine advertising
- Plan effective social digital advertising and campaign
- Expedia “Yappari Hawai’i” Special Campaign

Advertisement generated 155,343,419 impressions



- Continue with industry-wide campaign to increase booking pace by promoting wedding products
- Organize wedding events and reach target segment with digital marketing initiatives

ROMANCE PROMOTION



GOLF PROMOTION

Work with golf booking platforms and golf magazines to gain exposure and reach, while promoting neighbor island resort golf programs and targeting affluent audiences



ハワイ州観光局 × 楽天GORA コラボレーション企画



COLISEUM & NEWS



特別な思い出を作り...いざ、ハワイゴルフへ！



ハワイは1年を通じて温暖な気候で、世界中から訪れる観光客にとって、特別な思い出を作り出すのに最適な場所です。美しい自然と、世界最高級のゴルフコースが揃ったハワイ。この機会に、ハワイの魅力を最大限に楽しむために、ハワイゴルフガイドをぜひ読んでください。



MEDIA & TRAVEL TRADE EDUCATION

Continue to educate media and travel trade partners by conducting FAM tours, press tours, seminars, and webinars



DIRECT CONSUMER EVENTS

Hawai'i EXPO (6/1-6/2) and JATA Tourism EXPO (9/28-9/29)

Accelerate summer to fall booking, increase engagement with consumer, enhance island branding, expand awareness of made in Hawai'i products



TRAVEL TRADE INITIATIVES

Japan Summit (4/25-4/26) and Japan Mission (9/25-9/29)

Reinforce relationships between suppliers and travel agents, create opportunities to experience the islands to increase booking pace, enhance product development



INDUSTRY PARTNER COLLABORATION

Airline Co-op

- Japan Airlines
 - Print, OOH, Digital advertisement
 - TV media tie-up
- ZIPAIR
 - Enhance experiences for target markets
 - Digital advertisement
 - TV media tie-up



JAPAN AIRLINES

ZIPAIR



HIS



Collaboration with JATA (JTB, HIS, ANA X, JALPAK, Kintetsu, TTA, NTA, and Hankyu)

- Create a special landing page to introduce Yappari Hawai'i tour products
- Utilize Yappari Hawai'i logo and creative assets on all JATA and 8 travel agents owned media and advertisements to maximize reach
- Sync marketing efforts with travel industry partners to maximize campaign impact

MADE IN HAWAI'I PRODUCT PROMOTION



- Partner with DBEDT to increase and seek for the future possible opportunities such as antenna shop for made in Hawai'i products to be available in Japan
- Develop, communicate and organize opportunities to promote Made in Hawai'i products in events
- Produce articles/stories on Made in Hawai'i products in Japanese
- Approach target media to increase media coverage
- Diffuse stories of Made in Hawai'i products/businesses by working with industry partners

PARTNERSHIP OPPORTUNITIES

Opportunities	Date	Point of Contact
Japan Summit	April	sales@htjapan.jp
Hawai'i EXPO	June	hawaiiexpo@htjapan.jp
Tourism EXPO Japan	September	sales@htjapan.jp
Japan Mission	September	sales@htjapan.jp
FAM Tour	Throughout the year	sales@htjapan.jp
Press Tour	Throughout the year	prhtj@htjapan.jp

MAHALO!

HAWAII TOURISM
JAPAN

