



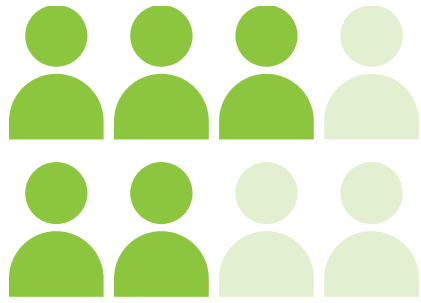
HAWAII TOURISM

JAPAN

2025 Brand Marketing Plan - Japan

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JAPAN TRAVEL AND ECONOMIC RECOVERY



As of June, **61%** of overseas trips from Japan have returned to pre-pandemic levels



Travel to Hawai'i is **44%** of 2019 levels while maintaining a high, **\$243** per-person, per-day spending



Japan's economy is expected to recover in the second half of 2024 with **1%** projected growth in 2025



The yen's value continues to fluctuate, with forecasts ranging from **140 to 170 yen** against the dollar

EMERGING TRENDS

CONSUMERS

Seeking eco-friendly products, personalized experiences, and health-conscious options

DIGITAL/SNS

Use of AI is expanding to enhance personalized marketing

MEDIA

Significant shift towards digital media with increased use of streaming services, social media, and subscription-based content replacing traditional TV and print

TRAVEL TRADE

Short distance and domestic travel are gaining popularity, driven by economic factors, sustainability concerns, and demand for unique, eco-friendly travel experiences

Airline seat supply has recovered to 70% of pre-pandemic levels

Strong demand continues for premium and business class seats, while economy class still facing vacancies

Airlines are optimizing schedules and enhancing digital promotions to boost direct bookings, focusing on first-time travelers and group incentives

By 2025, airline seat capacity is expected to recover to 75% of 2019 levels, with strategic emphasis on attracting high-spending travelers to enhance overall market value

AIRLINE TRENDS

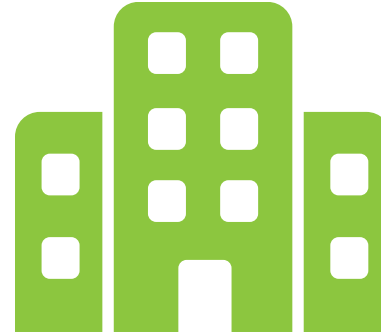
COMPETITIVE LANDSCAPE



Okinawa is a main domestic competitor, while nearby international destinations like South Korea, Taiwan, and Guam vie for highly coveted Japanese travelers



Despite being the top desired destination by Expedia, Hawai'i ranks third in search interest and seventh in actual bookings

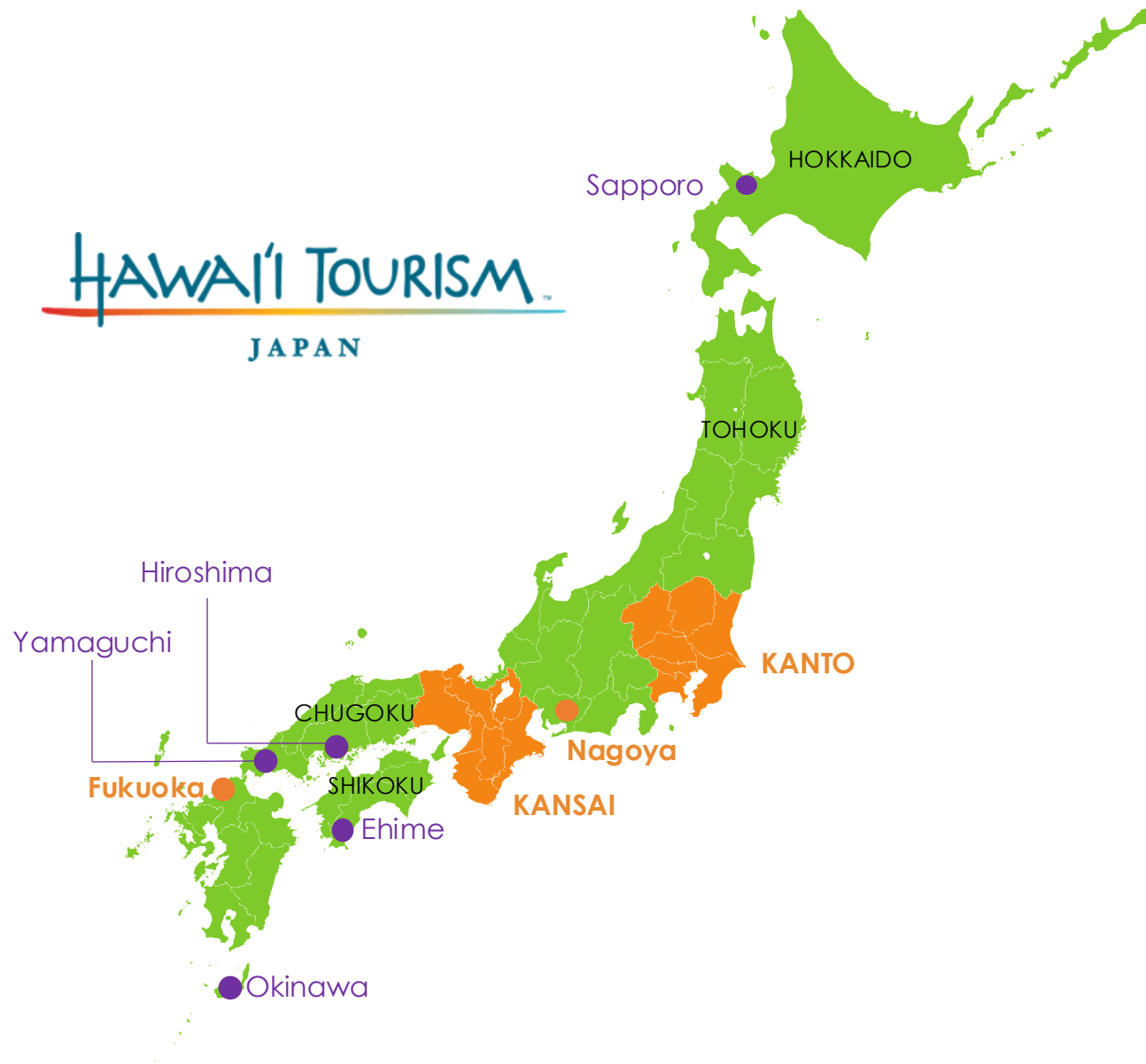


Hawai'i's hotel prices are significantly higher than Asia and Europe



To attract more travelers, Hawai'i must offer value-added services

GEOGRAPHIC TARGETS



MAJOR AREAS SERVED BY DIRECT FLIGHTS

- Kanto
- Kansai
- Nagoya (region)
- Fukuoka (region)

SECONDARY AREAS WITH REGIONAL AIRPORTS

- Chugoku and Shikoku regions
- Tohoku
- Hokkaido (Sapporo)

SISTER-CITIES

- Hokkaido
- Okinawa
- Fukuoka
- Hiroshima
- Yamaguchi
- Ehime

TARGET AUDIENCE



**Growth Experience
Group (First Timers)**



**Partner Travelers
(Couples)**



**Power Families
(Three-Generation)**



**Millennials
(Young Adults)**

CONSUMER

- Address Hawai'i's drop in ranking by promoting value-added packages and experiences
- Create targeted campaigns emphasizing cultural, ethical and historical experiences to engage younger audiences
- Invest in storytelling and visual campaigns that depict authentic island life using digital platforms and owned media
- Strengthen island-specific branding by collaborating with media partners and increasing presence on digital platforms to drive bookings



A close-up photograph of a person's lower legs and feet. They are wearing a traditional grass skirt with a wide, fringed hem and sandals made of green fern fronds. The person is standing on a dark green, square-tiled floor. The background is slightly blurred, showing more of the person's legs and the floor.

TRAVEL TRADE

- Collaborate with major wholesalers and OTAs to drive demand during off-peak periods
- Increase FAM trips, organize regular seminars and webinars, develop updated educational materials, and accelerate industry professional training initiatives
- Leverage airline partnerships for joint advertising and promotional activities to stimulate and expand travel demand



PUBLIC RELATIONS

- Enhance media outreach efforts by proactively pitching tailored plans to targeted media and freelancers
- Strengthen owned media by developing specific messaging for each visitor audience and deliver personalized content to increase engagement
- Promote regenerative tourism and cultural sensitivity that supports responsible travel to Hawai'i



ISLAND DISTRIBUTION

- Develop and share immersive videos and content highlighting each island's unique experiences
- Collaborate with airlines, travel agencies and OTAs to strengthen island branding, and create tailored products that showcase the distinct features of each island
- Work closely with the HTA and Island Chapters to align DMAP messaging across various communications channels

“YAPPARI HAWAI‘I – IT HAS TO BE HAWAI‘I” RECOVERY CAMPAIGN

旅、はじめるなら
やっぱり
HAWAI‘I

おもいっきり、ご褒美はじめよう。
めいっばい、親孝行はじめよう。
無制限で、青春はじめよう。
全力で、恋をはじめよう。
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。

The
HAWAIIAN
ISLANDS

Combine digital advertising campaign with industry partner collaboration to drive immediate travel bookings, targeting first-time visitors, families and couples

RECOVERY CO-OP

Support promotional efforts of select airlines, wholesalers, OTAs and credit card companies to optimize resources and expand reach

Ctrip x HIS HAWAII TOURISM JAPAN
ハワイホノルル
 パンフレット有効期間 2024.8.1-2024.10.31

東京発【成田・羽田】・大阪発・名古屋発・福岡発・札幌発・中四国発 全国各地からもご参加可能

1 HISだけの特別プラン
 眺めのよい高層階指定プランと充実のホテルラインナップ

2 早めの予約がお得!
 120日前までの予約で「ウルフキヤング・ステューネハウス」でのディナーと3つのお選べる特典をご用意!

HISの安心
 HISの現地支店が24時間日本語サポート

旅行代金は積み込み代金をお参観ください
 「心算る」を好き放つ **HIS**

ルックJTBでハワイへ

ハワイの旅をもっと素敵に!
 ビーチもショッピングも両方楽しみたい!
 憧れのホテルに泊まりたい!
 旅のスタイルに合わせてホテルや過ごし方の**アレンジも自由自在!**

ハワイ州観光局からのメッセージ

アロハ! ハワイは、美しい自然や独自の文化、ショッピング、グルメ、アクティビティなどの多様な観光資源が揃い、若者男女が安心して解放的になれる、昔も今もそれぞれが最高の楽しみ方を見つけることができる海外旅行先です。観光客のための三代代旅行、コロナ禍でできなかったハネムーンや海外挙式、もう一度思い出の時間を過ごすための記念日旅行、出張ついで自分へのご褒美旅行など、大切な人と特別な時間をぜひハワイでお過ごしください。皆さまのご来島を心よりお待ちしております!

大小の島々からなるハワイ諸島は魅力がいっぱい

KAUAI'I カウアイ島
 何百万年もの歳月を費やして自然が磨き出した、透き明かした自然の宝庫である島。

O'AHU オアフ島
 ビーチ・ショッピング・グルメに大自然とすべてが揃ったリゾートアイランド。人気のワイキキエリアだけでなく、郊外のハイセンスな田舎や豪華なビーチなども魅力。

MAUI マウイ島
 美しいビーチやオールドハワイの趣を味わう旅など、自然と人的魅力が満載な島。

HAWAII' I ハワイ島
 ハワイ諸島最大の島で、キラウエア火山位と動物の自然を味わえる。

日本から旅行代理店までの約1時間
 カムルルから飛行機で約50分

旅、はじめるなら
やっぱり HAWAII!

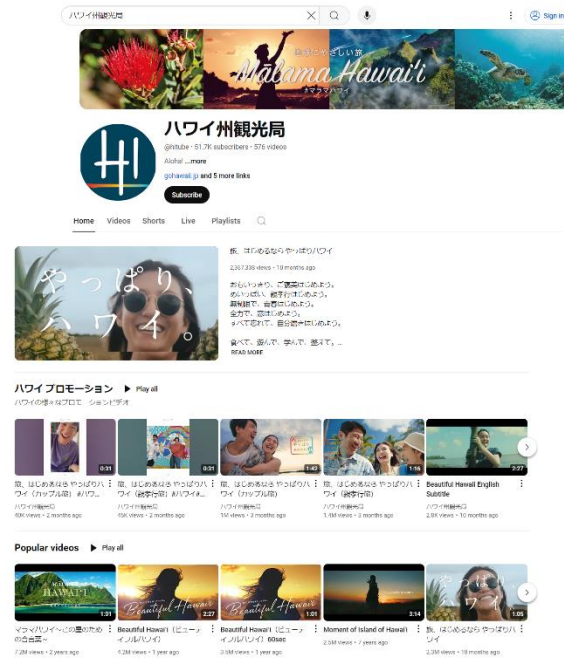
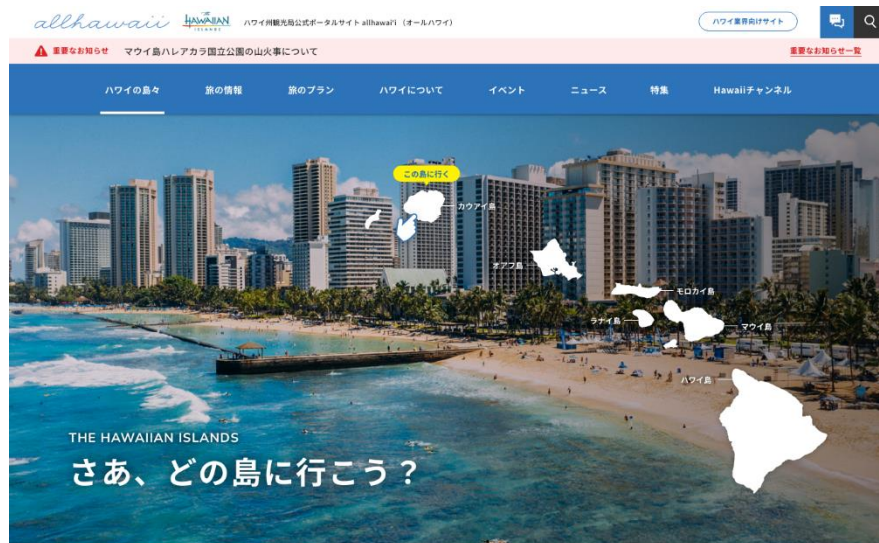
BEAUTIFUL HAWAI'I - ISLAND BRANDING

Build on the momentum of the earlier campaign by delving deeper into the unique branding of each Hawaiian island, enhancing their distinct identities, and strengthening partnerships with industry partners



DIGITAL MARKETING INITIATIVES

Redesign and launch allhawaii.jp, and assess and enhance social media channels



PARTNERSHIP OPPORTUNITIES

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

MAHALO!

HAWAII TOURISM
JAPAN

