



HAWAII TOURISM™

JAPAN

JAPAN MARKET UPDATE

ERIC TAKAHATA

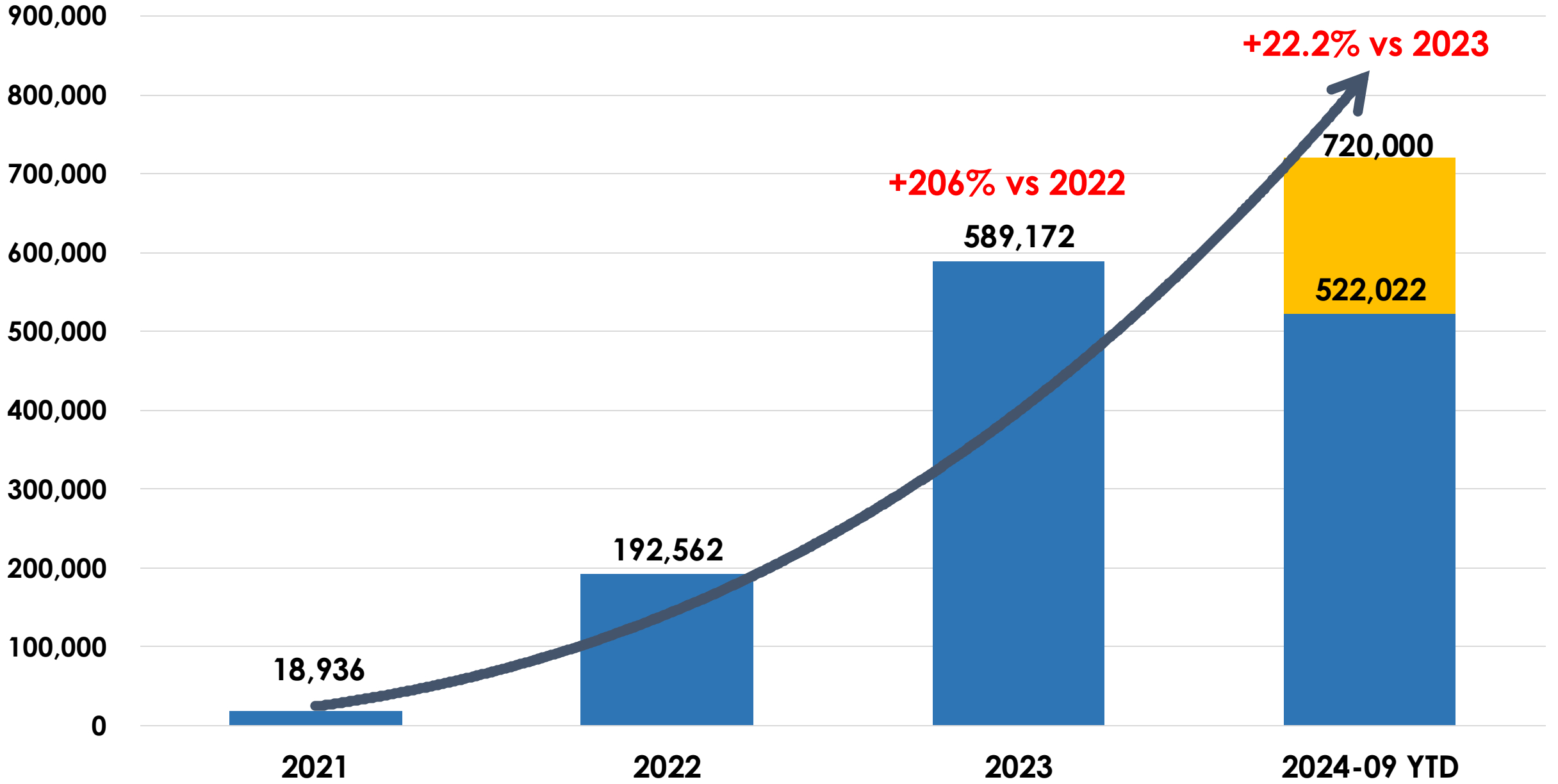
MANAGING DIRECTOR

11/26/2024

An aerial photograph of Honolulu, Hawaii, showing the city built on a coastal plain and hills. The ocean is a vibrant turquoise color with white waves breaking near the shore. In the background, there are green mountains under a blue sky with scattered white clouds. The title 'HAWAI' INBOUND SITUATION' is written in large, white, sans-serif capital letters across the center of the image. A thin white horizontal line is positioned below the text.

HAWAI' INBOUND SITUATION

JAPAN MARKET VISITOR ARRIVAL



2024 vs 2019 JAPAN MARKET VISITOR ARRIVALS (September YTD)

	2024 YTD	2019 YTD	Recovery % vs 2019
Total Spending (\$Million)	\$774.6	\$1,609.3	48.1%
Per Person Per Day (\$)	\$238.10	\$235.20	101.2%
Visitor Arrivals	522,021	1,152,900	45.3%
Visitor Days	3,253,593	6,843,530	47.6%
Length of Stay	6.23	5.94	104.9%

Source: <https://www.hawaii tourism authority.org/>

IMPACT TO TOURISM IN HAWAI'I – JAPAN MARKET

	Visitor Arrivals	Total Spending (\$mil.)	Per Person Per Day Average Spending (\$)	Tax Revenue (\$mil.)
2019	1,576,205	\$2,248.3	\$241.6	\$262.43
2022	192,562	\$359.4	\$235.4	\$41.69
2023	589,172	\$930.3	\$240.7	\$107.91
2024 (September YTD)	522,021	\$774.6	\$238.1	\$89.85
2024 Annual Forecast	717,173	\$1,070.5	\$241.9	N/A

Source: <https://www.hawaiitourismauthority.org/>

PACKAGE COST COMPARISON

Jan 2025

Night	Hawai'i	Guam	Australia	Seoul	Taiwan	Bangkok	Paris	London	Los Angeles	Singapore
4NT	¥320,600	¥265,600	¥264,300	¥91,800	¥155,100	¥170,800	¥355,800	¥427,300	¥493,900	¥270,600
3NT	¥268,650	¥264,950	¥239,800	¥88,800	¥82,400	¥169,800	N/A	¥356,750	¥454,400	¥238,450

Feb 2025

Night	Hawai'i	Guam	Australia	Seoul	Taiwan	Bangkok	Paris	London	Los Angeles	Singapore
4NT	¥310,200	¥276,100	¥243,350	¥95,800	¥123,200	¥182,300	¥416,400	¥363,800	¥367,650	¥269,300
3NT	¥273,750	¥233,450	¥199,250	¥87,300	¥80,900	¥148,400	N/A	¥331,300	¥321,600	¥239,100



An aerial photograph of a mountain range. The foreground is a dense, vibrant green forest. In the middle ground, a series of dark, rugged mountain peaks rise, with some slopes covered in green vegetation. To the left, the deep blue ocean is visible. The sky is a clear, bright blue with a thin layer of white clouds near the horizon.

HTJ INITIATIVE RECAP

YAPPARI HAWAI'I CAMPAIGN



- Out of Home Advertising (TV, Train station, Train, Taxi, Cinema)
- SNS、 Digital Advertising
- BtoC Campaign
- Media Tie-up
- Family Promotion Video launch in December

Over 768 million impressions



「久々のハワイ」どこが変わった？何をやるべき？
2024年の今、オアフ島で楽しむべき5つのこと



最後に訪れたのはいつだろう？ コロナ禍、円安、物価高など、いろいろなる理由でしばらく離れていたハワイ。

Island Retreat
星を囲んで、雲を横切って
隣島で極める大人なカンパンス

Secret Lanai, A Four Seasons Resort
秘密のランガイ、4シーズンリゾート

PUBLIC RELATIONS

GIRL
Fashion Beauty Love Fortune Life Style Trip Entains Night

Hawaii

RANKING
ハワイ

BRUTUS
7.30

HAWAII Oahu
ハワイの旅はマラマな気分

ハワイの魅力を伝える記事

Turtle Bay Golf Club
Royal Hawaiian Golf Club
Kapolei Golf Club
Royal Kona Golf Club

HAWAII
絶景！大自然がパワーをくれる、
美しいハワイ

7:23
宇都宮 26℃
ハワイの海 透明度60%アップ
ハワイの人たちが大切にしている自然や文化を一緒に守っていきながら楽しんでほしい

故郷を爆買し！ 使い切れ！
伊藤英明 つんくみ夫妻 松本伊代 出演！
ハワイ ヒロミ(58)
世界中から観光客が訪れるリゾート

1,605 stories generated from earned print, digital, broadcast, and Press tour

INDUSTRY PARTNER COLLABORATION

Airline Co-op

ANA

- Booking stimulation campaign
- Mega Press FAM
- Media tie-up
- Advertising

Hawaiian Airlines

- Fukuoka promotion
- Educational tour program
- Romance FAM
- Affluent credit card member seminar

Japan Airlines

- Booking stimulation campaign
- Media tie-up
- 70th year anniversary campaign
- Island of Hawai'i promotion



INDUSTRY PARTNER COLLABORATION

Travel Trade

HIS

- Yappari Hawai'i promotion
- Booking stimulation campaign
- Mālama Hawai'i product development



JTB

- Yappari Hawai'i promotion
- Booking stimulation campaign
- Consumer event support
- Product development
- FAM tour



Expedia

- Booking stimulation campaign
- Special landing page
- Advertisement



INDUSTRY PARTNER COLLABORATION

Rakuten

Point booking stimulation campaign

- Advertisement

Veltra

- Booking stimulation campaign with advertisement
- Special landing page

Media

MyNavi Wedding

- Romance media landing page
- Booking stimulation campaign

Rakuten Travel



MEDIA/TRAVEL TRADE FAM

Over 500 participants



MEDIA/TRAVEL TRADE EDUCATION

Over 3,000 participants



JAPAN MISSION

Media Event (9/25)

VIP Reception (9/25)

Tourism EXPO Japan(9/26-9/30)



94 media Representatives
18 stakeholders from Hawai'i

61 VIP guests
110 total attendees

15,000 attendees
Won No. 1 Travel Professionals' Choice Booth Grand Prize

MADE IN HAWAI'I PROMOTION

Consumer Event



Support events that promotes made in Hawai'i products

Made in Maui County Festival Exporting Made In Hawai'i Products to Japan Seminar



4 distributor and 2 departement store reps.
Meeting with festival vendors
100 seminar attendees (with DBEDT)

Pop-up/Antenna Shop



Aloha Market by Mana Up Hawai'i
@ Haneda Airport (Feb. 2025)
HIS Antenna Shops

- Continue with industry-wide campaign to increase booking pace by promoting wedding products
- Reach target segment with digital marketing initiatives

Over 56 million impressions on advertisement



ROMANCE PROMOTION

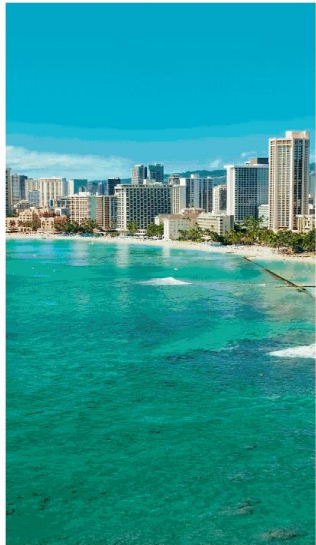


Work with golf booking platforms and golf magazines to gain exposure and reach, while promoting neighbor island resort golf programs and targeting affluent audiences

GOLF PROMOTION



ハワイ州観光局 × 楽天GORA コラボレーション企画



Over 33 million impressions on advertisement

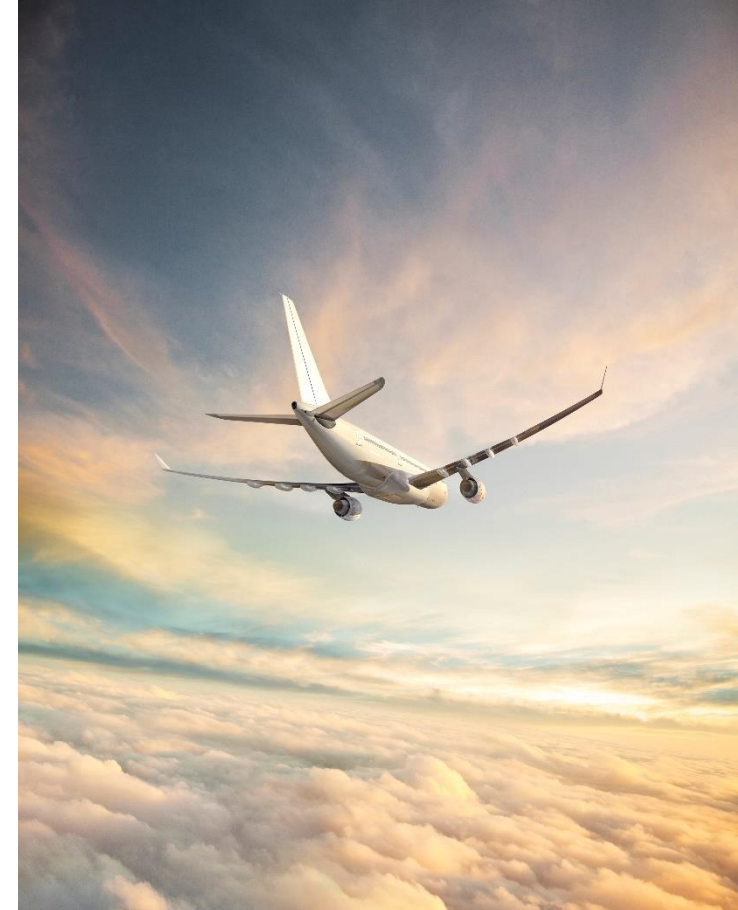




2025 STRATEGIES

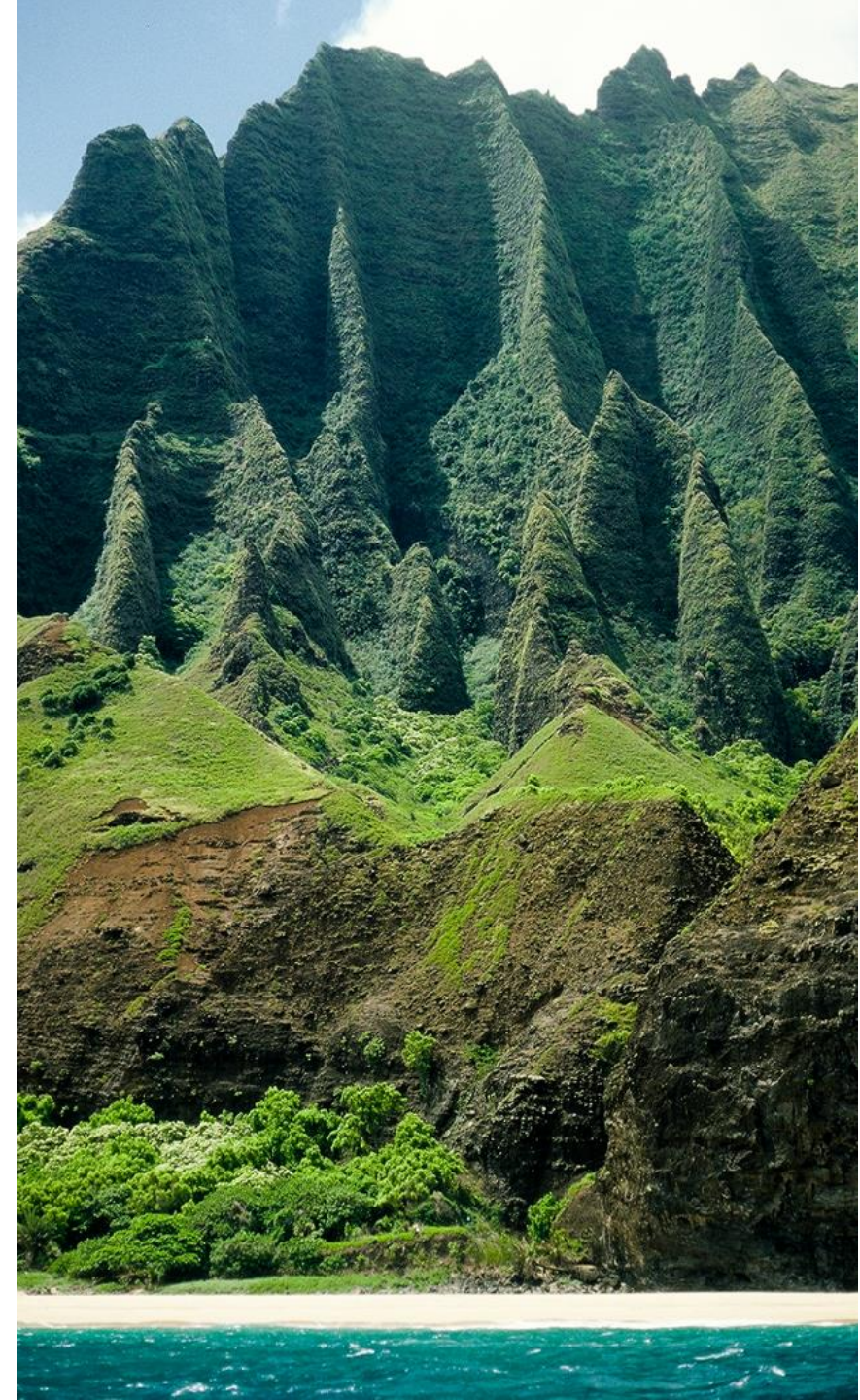
SHORT-TERM STRATEGY

- Advertising promotion campaigns through partnerships with companies in the travel industry, and stimulating travel demand through media outreach and distribution
- Increase booking pace through collaboration with airlines, travel agencies, and OTAs
- Increase high value traveler initiatives
- Promote the attraction of MICE groups through collaboration with Meet Hawai'i
- Destination education and product development support within the travel industry



MID-LONG TERM STRATEGY

- Attract first-time visitors
- Continue initiatives targeting the youth market
- Strengthen the branding of each island
- Strengthen digital content marketing
- Increase high value traveler initiatives
- Further initiatives to attract the hula market
- Hawai'i as a hub of education, expanding educational tourism



MAHALO!

HAWAII TOURISM
JAPAN

