

The logo for Hawaii Tourism Japan, featuring the words "HAWAII TOURISM" in a white, stylized font with a red and yellow horizontal line underneath, and "JAPAN" in a smaller, white, sans-serif font below it.

HAWAII TOURISM™

JAPAN

The main title of the report, "2025 HTA Spring Tourism Update Japan Market", displayed in large, white, bold, sans-serif font with a slight drop shadow, centered over the ocean scene.

# 2025 HTA Spring Tourism Update Japan Market

The name and title of the author, "Eric Takahata" and "MANAGING DIRECTOR", displayed in white, bold, sans-serif font with a slight drop shadow, centered over the lower part of the ocean scene.

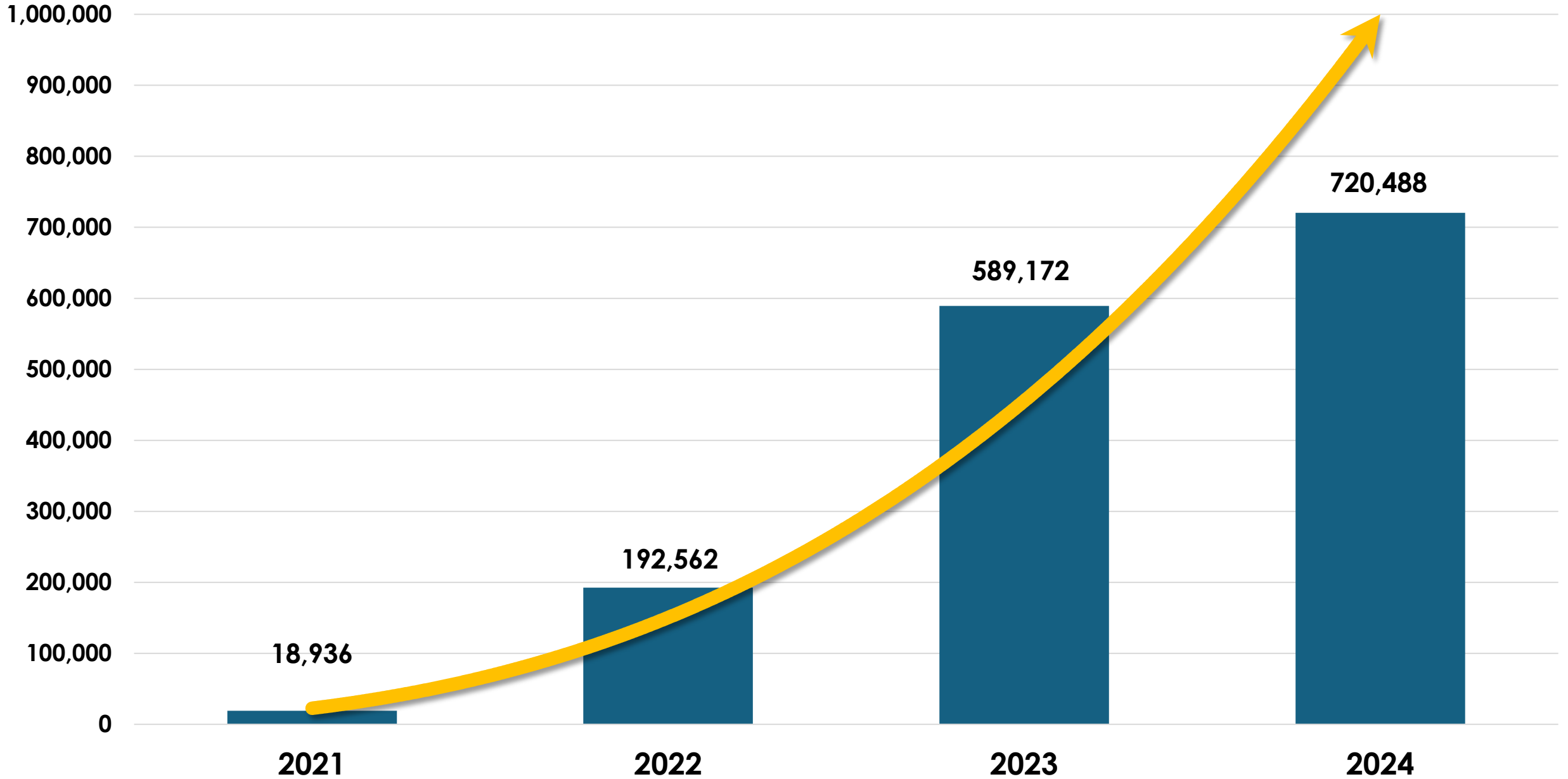
Eric Takahata  
MANAGING DIRECTOR



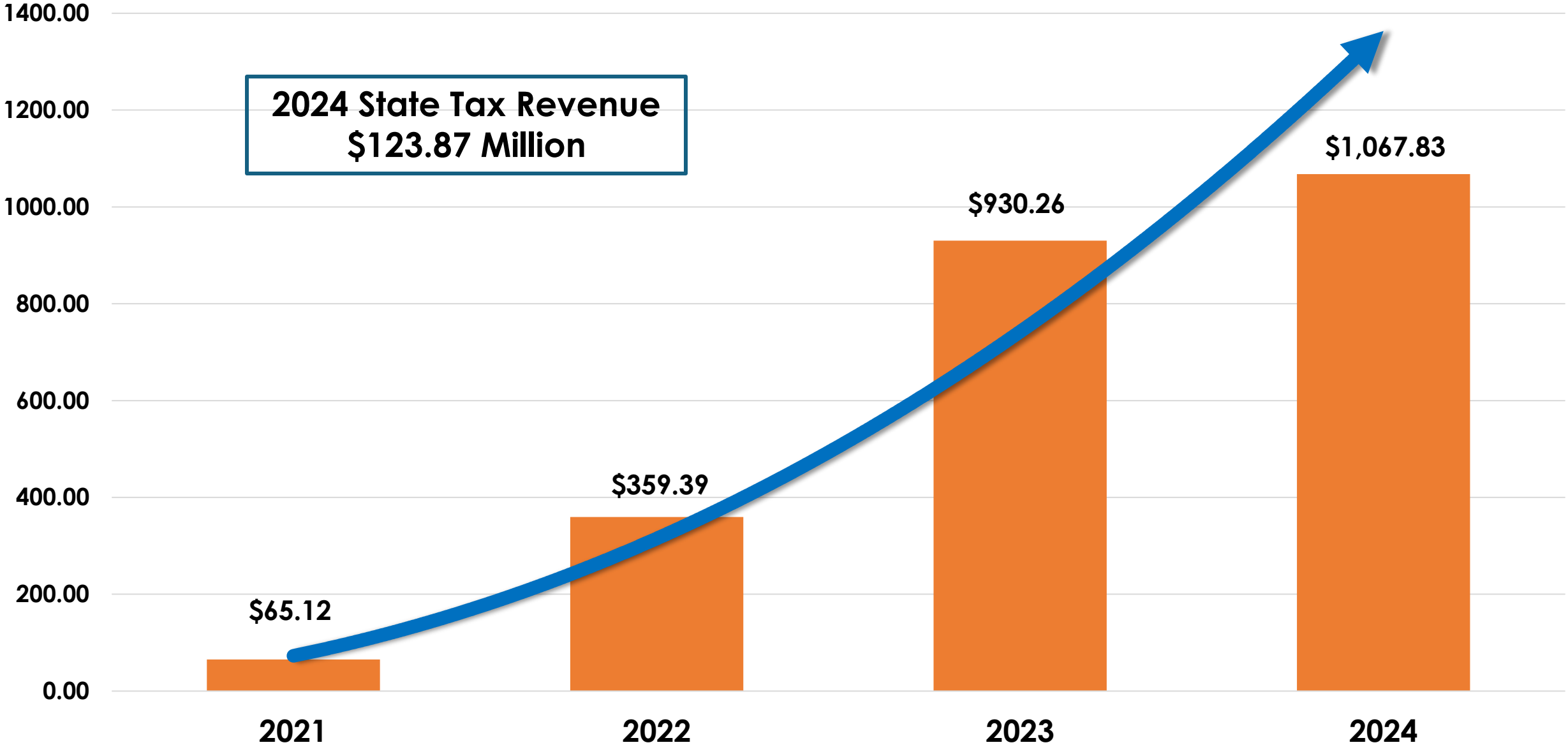
# MARKET ANALYSIS

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# Japan Market Visitor Arrival



# Japan Market Total Expenditure

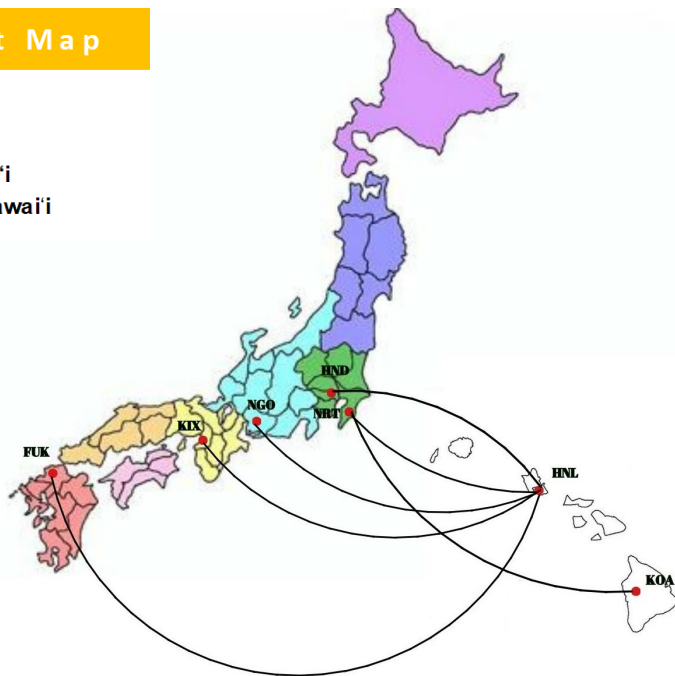


## 2024 vs 2023 JAPAN MARKET VISITOR ARRIVALS

	2024	2023	Recovery % vs 2023
Total Spending (\$Million)	\$1,067.8	\$930.3	114.8%
Per Person Per Day (\$)	\$239.74	\$240.72	99.6%
Visitor Arrivals	720,488	589,172	122.3%
Visitor Days	4,454,166	3,864,472	115.3%
Length of Stay	6.18	6.56	94.2%

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

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



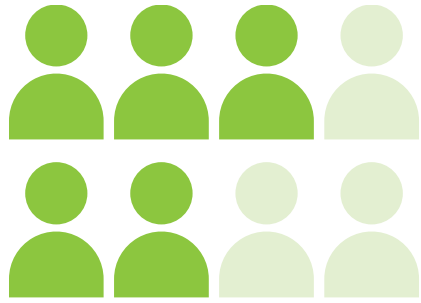
# AIR SEAT SYNOPSIS

## Top 5 % Share by Area (2019)

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

	Flights			Seats		
	2025	2019	% of 2019	2025	2019	% of 2019
January	369	696	53.0%	105,351	174,100	60.5%
February	328	632	51.9%	92,288	158,160	58.4%
March	370	694	53.3%	104,290	173,638	60.1%
<b>Total</b>	<b>1,067</b>	<b>2,022</b>	<b>52.8%</b>	<b>301,929</b>	<b>505,898</b>	<b>59.7%</b>

# JAPAN TRAVEL AND ECONOMIC RECOVERY



In 2024, **64.8%** of overseas trips from Japan have returned to pre-pandemic levels. **+35.2%** from 2023.



Travel to Hawai'i is **45.7%** of 2019 levels while maintaining a high, **\$240** per-person, per-day spending



Japan's economy is growing with GDP gained annualized **2.8%** in Q4 of 2024. 2025 growth estimated above trend at around 1.2%



The yen's value continues to fluctuate, with forecasts ranging from **140 to 160 yen** against the dollar

# COMPETITIVE LANDSCAPE



Okinawa is a main domestic competitor, while international destinations like Australia, Singapore, Thailand, and Guam vie for highly coveted Japanese travelers



Despite being one of the top desired destination by Expedia, Hawai'i ranks third in search interest and fifth 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





# TARGET AUDIENCE

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# TARGET AUDIENCE



**Growth Experience  
Group  
(First Timers)**



**Partner Travelers  
(Couples)**



**Power Families  
(Three-Generation)**



**Millennials  
(Young Adults)**



# STRATEGIES

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# CONSUMER

- Address Hawai'i's drop in ranking by promoting value-added packages and experiences
- Expand on high-value visitor promotion
- 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





## 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

A person with long dark hair, wearing a blue wetsuit, is shown from the waist down, standing in shallow, rippling water. They are holding a small green plant with a large heart-shaped leaf and are in the process of planting it into the water. The water is a light brownish-green color, and there are several other similar plants already in the water. The background is a soft-focus view of the water and more plants.

# 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 Visitor Bureaus to align regenerative messaging across various communications channels



# YTD ACTIVITIES

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# YAPPARI HAWAI'I PROMOTION VIDEO CREATION

## 3 GENERATION FAMILY



# YAPPARI HAWAI'I ADVERTISING CAMPAIGN



- Distribute through outdoor, digital, and consumer magazine advertising
- Plan effective social digital advertising and campaign

## Advertising results:

- OOH: 6,804,302 impressions
- SNS: 12,306,286 impressions
- YouTube: 2,983,993 impressions
- Yahoo/Google Web banner: 63,085,289 impressions
- Print Magazine: 4,433,450 impressions

**TOTAL: 89.9 million impressions**

# INDUSTRY PARTNER COLLABORATION

## HTJ X Expedia X VISA



## HTJ X BRAND USA X Expedia



## HTJ X VELTRA



## Campaign contents:

- Special landing page created
- Placing advertisements
- PR and Media Engagement

## Expedia results:

- **25K room** bookings
- **4.5K air** bookings
- **13.62 million** revenue
- **616.67 million** impressions

## Veltra results

- **57,280 pax** participants
- **1.43 million** reach
- **107K** impressions

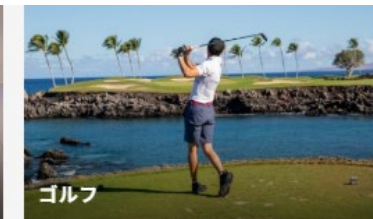
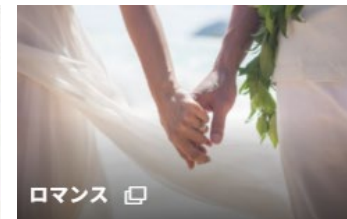
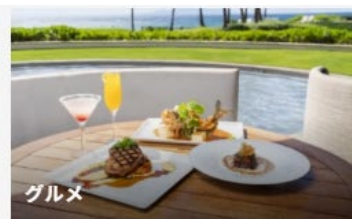
# OFFICIAL JAPANESE WEBSITE ALLHAWAII RENEWAL

allhawaii

ハワイ州観光局公式日本語サイト



- Enhancement of search functionality and intuitive and user-friendly design
- Improved accessibility and usability on smartphones
- Purpose-specific model plans newly introduced
- Newly introduced chatbot feature allows for real-time responses
- *Special Features* page to showcase Hawai'i in a deeper and more engaging way





# 2025 MAJOR PROGRAMS

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# “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。  
めいっぱい、観光行はじめよう。  
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、自分置きはじめよう。  
  
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。

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

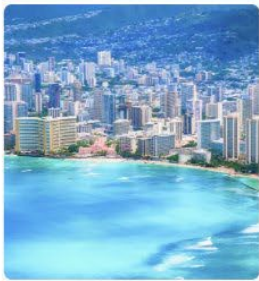
# YAPPARI HAWAI'I KAMA'AINA CAMPAIGN



MOVIE NEWS CAMPAIGN



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、  
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## HOTEL

ハワイアン航空で行く  
ハワイ旅行が当たる  
+ 2日目

海外旅行では欠かせない「やっぱりハワイ」今年も、ペアハワイ旅行が当たるチャンス！今すぐキャンペーンに応募しよう！

「やっぱりハワイ」キャンペーン実施中！日本からのお客様WELCOME！お部屋の料金15%OFF＆リゾートフィディスカウント

「やっぱりハワイ」キャンペーン実施中！日本からのお客様WELCOME！お部屋の料金15%OFF＆リゾートフィディスカウント

ワイキキを象徴する4つのホテル専用 前泊1航路券をまとめて予約  
「The Waikiki Collection」(ワイクイ)

ワイキキを象徴する4つのホテル専用 セットで予約できるワイクイ。今なら豪華アップグレードやリゾートバスなどの特権あり！

「やっぱりハワイ」宿泊プランを販売中！「今すぐハワイ」から最大25%オフ オールインclusiveのお部屋をご予約の場合、ベッド2段リクエストを確約します。

「やっぱりハワイ」宿泊プランを販売中！リゾート料金30%オフ、「今すぐハワイ」プランから最大20%オフ・アーリーチェックイン確約・ベッドタイプリクエストを確約

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「やっぱりハワイ」宿泊プランを販売中！リゾート料金25%オフ・ベッドタイプリクエストを確約 (対象カテゴリーのみ)

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リニエールしたワイキキ・マリアで「やっぱりハワイ」期間内キャンペーン実施中。

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## ACTIVITY & ATTRACTION

アドベンチャーエディションのツアーにご参加いただくとお礼コード「ALOHA20」でツアー費が20%オフになります。

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船難ツアー、船難ツアーをオンラインで購入すると、2人目が50%オフとなります。(最大2名様までディスカウント料全適用。)

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25%オフ！やっぱりハワイキャンペーン実施中

25%オフ！やっぱりハワイキャンペーン実施中

「やっぱりハワイ」キャンペーンを販売中！1人1人送料を輸入すると3つの特典が受けられます！

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ロハーツ特産、ドールパイナップル期間限定ツアー、ノースショア・ビーチ、ハレイワタウンにお連れします。リンクからお申し込みで10%引きをさせていただきます。

ロハーツ特産、ドールパイナップル期間限定ツアー、ノースショア・ビーチ、ハレイワタウンにお連れします。リンクからお申し込みで10%引きをさせていただきます。

4日または1日乗り放題チケットをオンラインで購入で10%オフになる「やっぱりハワイ」キャンペーン実施中！

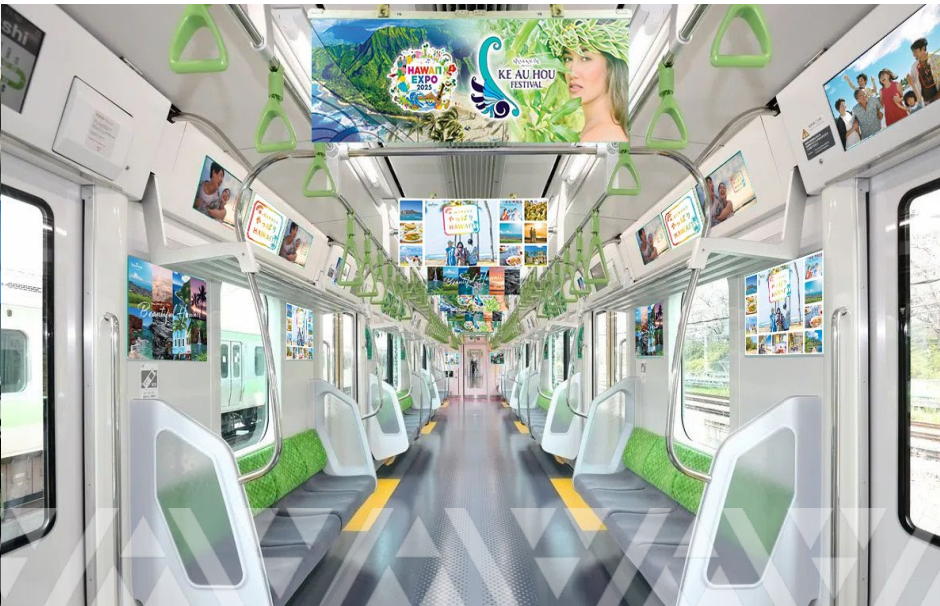
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ハワイのゴルフ手配はお任せ下さい！個人から各種コンペまでお手伝い致します。今なら「やっぱりハワイ」キャンペーン実施中！

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# ADVERTISING / DIGITAL MARKETING

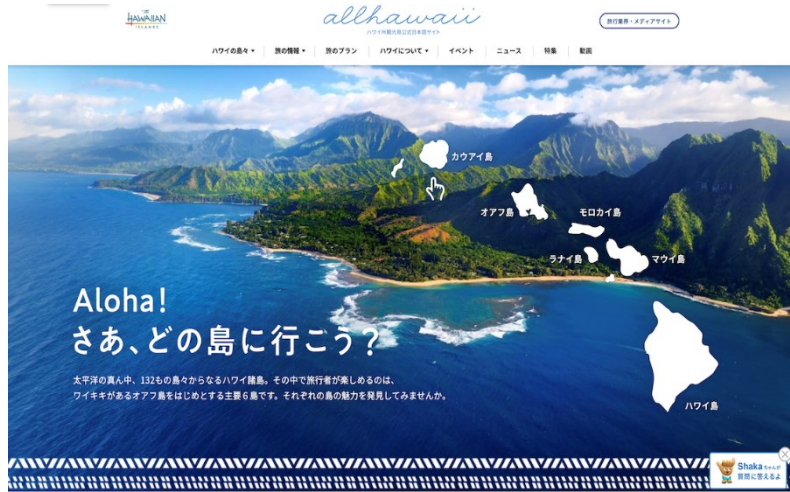
- Distribute through train channel, outdoor signage, in-flight monitor, cinema ad, and consumer magazine advertising
- Plan effective social digital advertising and campaign





# DIGITAL MARKETING INITIATIVES

Strengthen owned media contents and continue to conduct SNS campaigns, Influencer and creator projects.



New Series !



2025.01.31

次の旅行はハワイでゴルフ旅!



2025.02.06

2月はMahina 'Ōlelo Hawai'i (ハワイ語月間)



# HTJ OWNED MEDIA



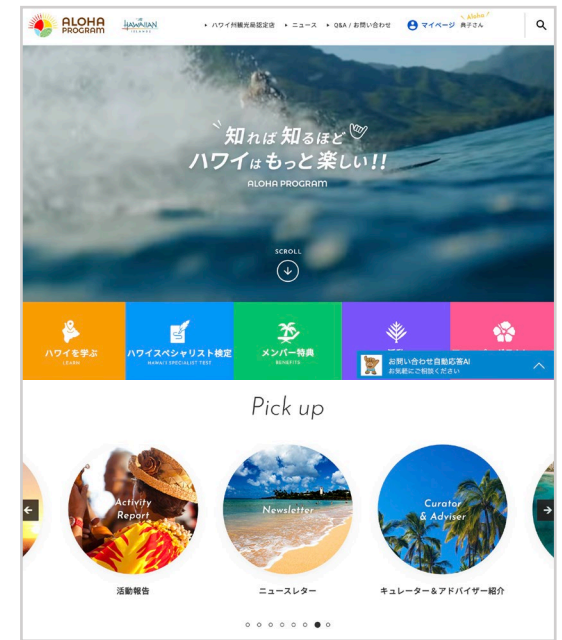
Allhawaii



Mālama Hawai'i



Hokūle'a



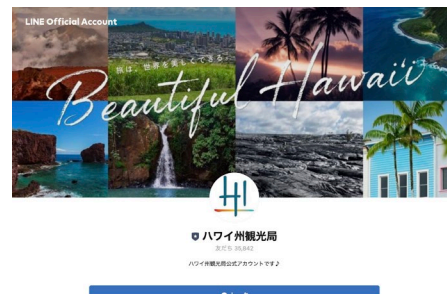
Aloha Program



X



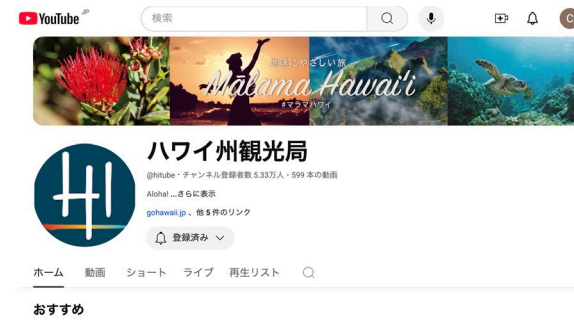
Facebook



LINE



Instagram



YouTube

# 2025 MEDIA ACTIVITY

## Media FAM

## Earth Day FAM

Theme: Sustainable Experiences

Media: 1~4 writers

April (4<sup>th</sup> week, TBD)

## Hawai'i Gastronomy FAM

Theme: Latest Food Scene

Media: 1~4 writers

June (3<sup>rd</sup> week, TBD)

## Media Webinar

- March
- July
- October

## Media Event

November 13 (TBD)

## HTJ Media Reception



# HAWAI'I EXPO 2025



**5/10 (Sat.) & 5/11 (Sun.)**  
**Yoyogi 2nd Gymnasium**

Building area: 3,872m<sup>2</sup>  
Arena area: 1,300m<sup>2</sup>  
Capacity: 2,803 seats



# CONSUMER EVENTS



# TARGET EVENTS

<b>Title</b>	<b>Area</b>	<b>Date</b>
<b>Aloha Market powered by ManaUp HAWAI'I</b>	Tokyo (HND)	2/26 - 3/25
<b>Sapporo Marui Imai Hawai'i Fair</b>	Hokkaido	4/16 - 4/22
<b>Fresh! Fun! Hawai'i – Takashimaya Yokohama</b>	Kanagawa	5/1 - 5/6
<b>HAWAI'I EXPO 2025</b>	Tokyo	5/10 - 5/11
<b>Chigasaki Aloha Market 2025</b>	Kanagawa	5/10 - 5/11
<b>JST Nagoya HAWAI'I Festival</b>	Nagoya	5/23 - 5/25
<b>May Day Japan</b>	Tokyo	5/24
<b>Fukui Aloha Festival</b>	Fukui	6/1
<b>Fresh! Fun! Hawai'i – Takashimaya Tamagawa</b>	Tokyo	6/4 - 6/9
<b>Fresh! Fun! Hawai'i – Takashimaya Osaka</b>	Osaka	7/23 - 7/28
<b>Fresh! Fun! Hawai'i – Takashimaya Kyoto</b>	Kyoto	7/30 - 8/5
<b>JATA TOURISM EXPO 2025 in Nagoya</b>	Aichi	9/25 - 9/28
<b>Ka Hula Hoa Yokohama</b>	Yokohama	10/18 - 10/19
<b>Shinjuku Takashimaya Hawai'i Event</b>	Tokyo	11/1 - 11/2
<b>Shibuya Furusato Festival</b>	Tokyo	11/1 - 11/2

# JAPAN SUMMIT

## 4/18 (Fri) Hawai'i Convention Center

**10:00-12:30**

Hawai'i Seminar & Keynote speech

- Market Updates by Hawai'i Tourism Japan
- Island Updates by Kaua'i, O'ahu, Maui, Island of Hawai'i
- Keynote Speech by Tribal Media House, Inc.

**12:30-14:00**

Luncheon

**14:00-17:30**

BtoB Trade Show

\*Agents will be sitting at the booth

**19:00~**

Cocktail Reception at Outrigger Waikiki Beachcomber Hotel

\*Sales team will follow up with participants via email once the schedule is finalized.

## **4/19 (Sat) O'ahu FAM – Agent Only**



**You can sign up for participation here!**



# INDUSTRY PARTNER COLLABORATION

## Airline Co-op promotion

All Nippon Airways, Delta Air Lines

Hawaiian Airlines, Japan Airlines

- Print, OOH, Digital advertisement
- Media tie-up
- Press FAM
- Social Media Campaign



## Collaboration with JATA

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

- ESTA & Passport Campaign / MCI Booking Campaign
- 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



# INDUSTRY PARTNER COLLABORATION

## OTA Co-op promotion

### Expedia

- Booking stimulation campaign
- Special landing page
- Advertisement

### Rakuten

- Point booking stimulation campaign
- Advertisement

### Veltra

- Booking stimulation campaign
- Special landing page
- Advertisement

Veltra



Rakuten Travel



# TRAVEL TRADE EDUCATION

## Hawai'i Kai (HPCJ)

### Webinars & Seminars

3/13/25 : Online Seminar: General Information  
April : General Information  
May : Group & Education  
July : General Information for New Staff  
Sep : Romance  
Oct : General Information

### Workshop

Mid Jun Fukuoka & Osaka  
Mid July Sapporo & Sendai  
Sep Nagoya  
Nov Tokyo

## JOTC Webinars 2025 (TBA)

No.1: 2024/5/23~31  
No.2 : 2024/8/20~30  
No.3 : 2024/11/21~29  
No.4 : 2025/2/25~3/7



# TRAVEL TRADE EDUCATION

Continue to educate travel trade partners and educators by conducting FAM tours.

- July: O'ahu
- Dec: Island of Hawai'i & O'ahu



# VIP RECEPTION

Date: 11/12/25





# ALOHA PROGRAM

- Conduct a workshop blitz in five cities across Japan, providing an opportunity to learn about Hawaiian culture and history with invited culture practitioners
- Host networking events in each city to engage and connect Hawai'i fan communities
- Conduct a webinar once per quarter, live-streaming from Hawai'i four times a year

# PARTNERSHIP OPPORTUNITIES

Opportunities	Date	Point of Contact
Japan Summit	4/18	sales@htjapan.jp
Hawai'i EXPO	5/10-5/11	hawaiiexpo@htjapan.jp
Media Event	November	prhtj@htjapan.jp



MAHALO!

HAWAII TOURISM™  
JAPAN