

The logo for Hawaii Tourism Japan features the words "HAWAII TOURISM" in a white, stylized, sans-serif font. A horizontal line with a color gradient from red to blue passes behind the text. Below this, the word "JAPAN" is written in a smaller, white, all-caps sans-serif font.

HAWAII TOURISM

JAPAN

2023 HTA Spring Tourism Update

4.12.2023

Eric Takahata

Managing Director

HAWAI'I TOURISM JAPAN TEAM



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Manager



Ayako Ishiwari
Manager



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Sales Manager



Koharu Katsura
Event Promotion Manager



Manami Saito
Assistant Sales Manager



Ayumi Koinuma
Information Specialist
Part timer

MARKET SITUATION





GENERAL ECONOMY

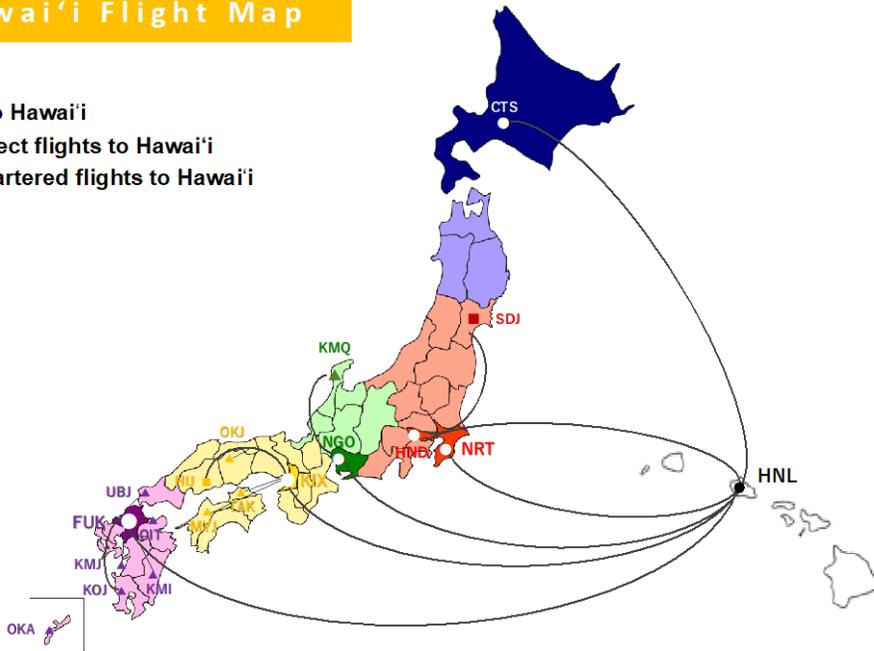
- The Japanese economy expanded 1.1% in 2022 over 2021
- Japan's GDP grew 1.3% in 2022, reflecting inflation throughout the year
- Gradual strengthening yen (\$1 = 132.59 Yen)
- Government stimulus package to drive modest recovery
- Japanese economy expected to recover, centered on rebound demand in the service sector. Personal consumption is expected to continue recovering (Fiscal 2023 it is expected to be +1.5%)



OUTBOUND TRAVEL/TRAVEL SENTIMENT

- Return of inbound foreigner to stimulate Japan's economy
- Domestic travel promotion by Japanese government
- Outbound recovery to follow
- Downgrade COVID-19 to Class 5 under the Infectious Diseases Control Law (5/8/23)
- Mask mandate became optional (3/13/23)
- Hawai'i remains top destination of choice

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



AIR SEAT SYNOPSIS

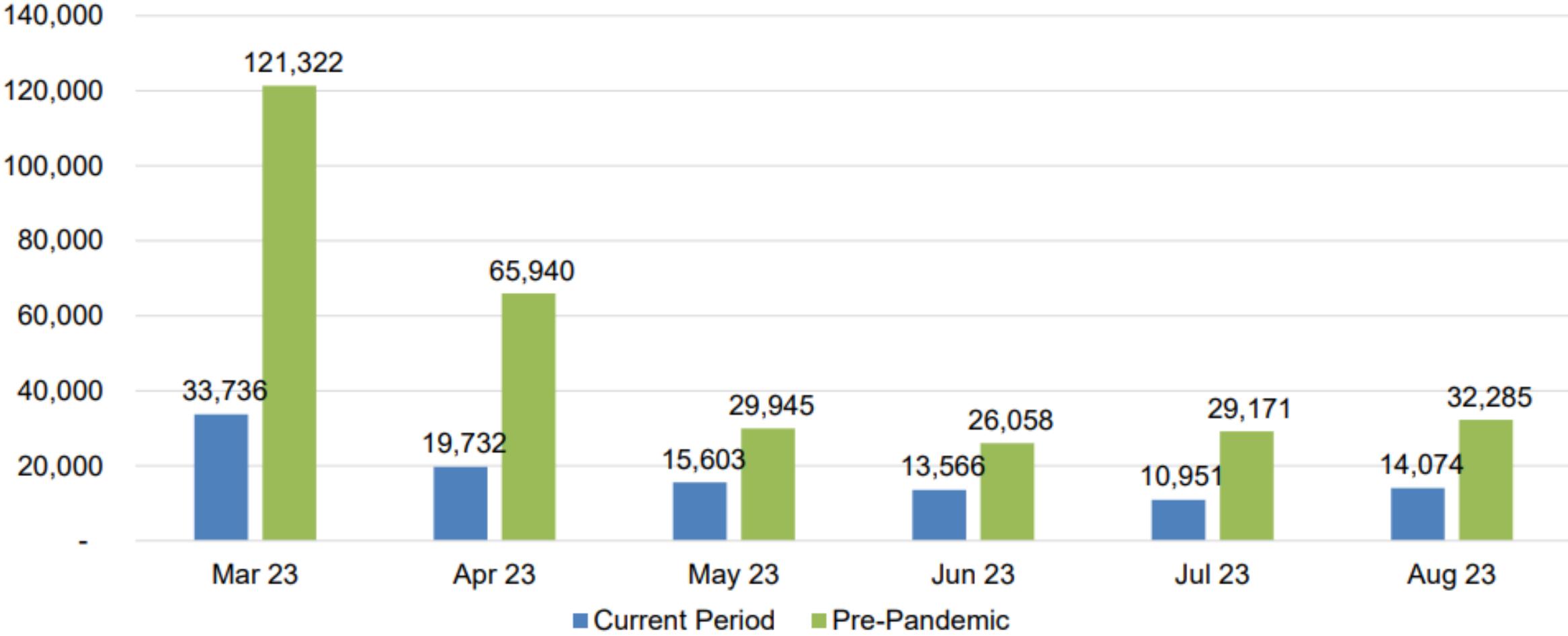
Top 5 % Share by Area (2019)

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

| | Flights | | | Seats | | |
|--------------|------------|--------------|---------------|----------------|----------------|---------------|
| | 2023 | 2019 | %Change | 2023 | 2019 | %Change |
| 23-Apr | 282 | 634 | -55.5% | 75,942 | 158,756 | -52.2% |
| 23-May | 296 | 641 | -53.8% | 83,318 | 161,248 | -48.3% |
| 23-June | 283 | 610 | -53.6% | 79,054 | 155,388 | -49.1% |
| Total | 861 | 1,885 | -54.3% | 238,314 | 475,392 | -49.9% |

BOOKING PACE

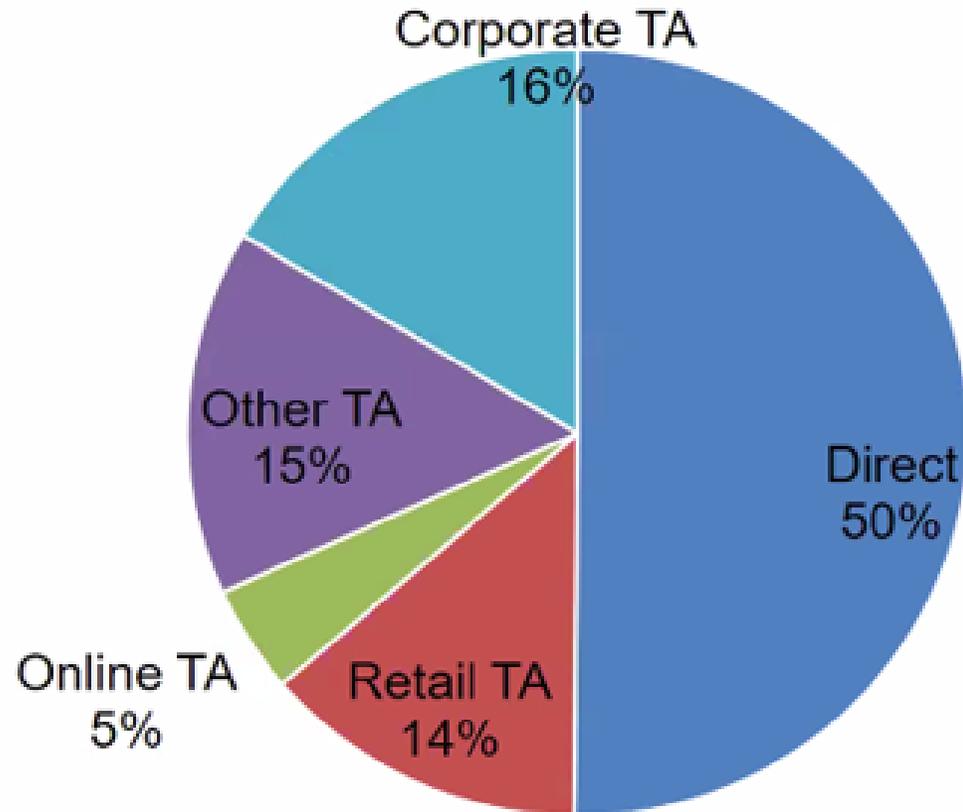
Six Month Outlook: Japan



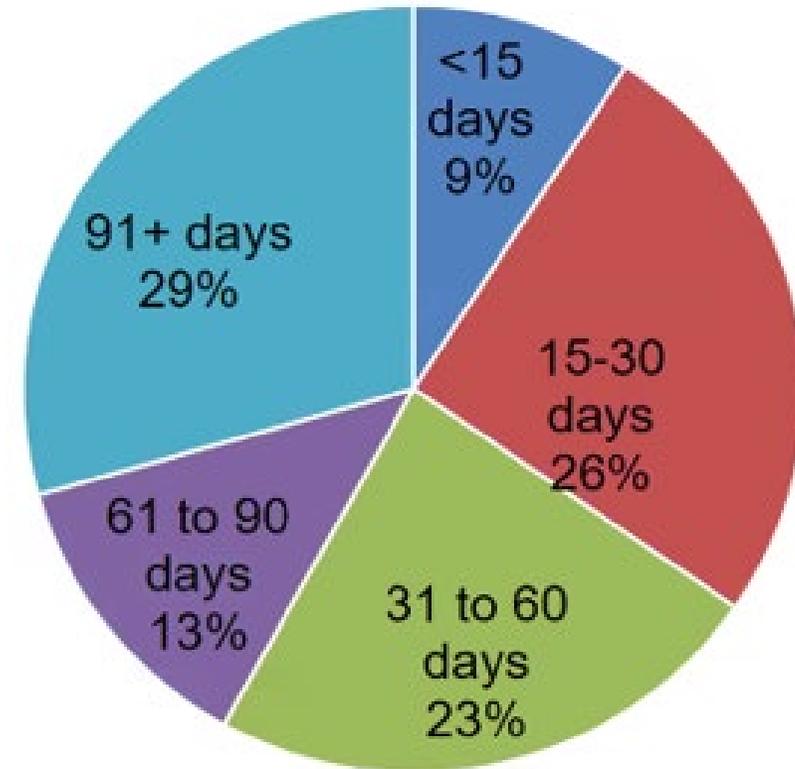
Source: ARC/ForwardKeys Destination Gateway

DISTRIBUTION CHANNEL & LEAD TIME

Distribution Channel



Lead Time



COMPETITIVE LANDSCAPE



Short Haul Destinations

- South Korea
- Taiwan
- Hong Kong/Macau
- Thailand
- Singapore
- Guam



Long Haul Destinations

- Europe
- Canada
- Australia



TARGET AUDIENCE

TARGET AUDIENCE



**Affluent
Traveler**



**Romantic
Couples**



**Experience
Seekers**



**Ethical
Younger
Generation**



**Multi
Generation
Family**

Target regions with direct flights to Hawai'i, annual household income of \$75,000+ and over \$1 million in assets

CORE BRANDING MESSAGE

A close-up photograph of a single water droplet on a green leaf. The droplet is perfectly spherical and sits at the center of the frame. The leaf's veins are clearly visible, radiating outwards from the droplet. The background is a soft, out-of-focus green, creating a sense of depth and natural beauty. The text 'CORE BRANDING MESSAGE' is overlaid in a clean, white, sans-serif font, centered horizontally and positioned in the upper third of the image.

HAWAI'I CORE BRAND MESSAGING

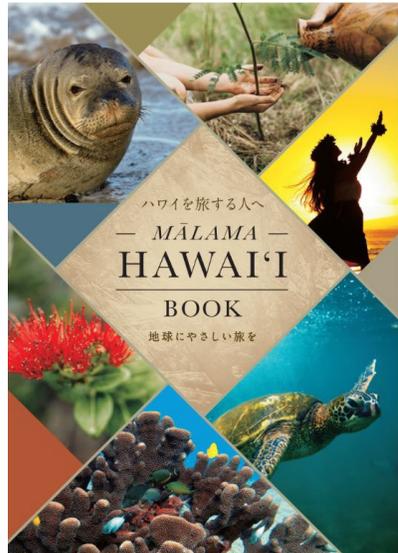
Position Mālama Hawai'i as the catalyst for change in our state's regenerative tourism approach



自然を、大地を、人間を
想いやる心、愛する心。
Mālama - マラマ
ハワイが、そして世界が
この言葉に、この優しさに包まれたなら
この地球はもっと美しくなるはず。
この星のための合言葉。

— MĀLAMA —
HAWAI'I

HAWAI'I TOURISM
JAPAN



PICK UP! 取り組み紹介

1 Mālama Hawai'i INITIATIVES

01 ゼロウェイストオアフ
ハワイに廃棄物が存在しない、よりサステイナブルなコミュニティを目指して「ゼロウェイストオアフ」は、廃棄物の少ない未来を築くため、廃棄物の削減の取組、買付、アップサイクルを推進している団体です。プロダクトライフサイクル(Takeout)は、ハワイ初のゴミの出ないテイクアウトの導入を目的に作られた、持ち帰り用容器の再利用プログラム。対象レストランで、毎月指定の日を指定している店舗を受け取り、7日以内に返却ステーションに容器を返却、テイクアウトを選び、エコな循環が生まれています。

02 オラカイ株式会社
ハワイの海で育てられたシーグラスは、環境にやさしい博士の指からウェンハオ・サン博士が2006年に創立したマリン・アグリチャー株式の「シーグラス」による水耕栽培で、廃棄物ゼロに貢献することで、プラスチックのゴミの削減の貢献を続けています。

03 マラマイナホ
地球上最古の海洋生物の一種、ウミガメを絶滅の危機から保護する取り組みの中心となる存在である自然保護「マラマイナホ」。ホネ・ガーデンとつながる希少なサンゴが、カメの餌に変わると、ウミガメを救うために正しい知識や行動を伝え、認識してもらう役割を担っています。



Q1 REVIEW

MMA STATS (As of Feb.)

| Japan MMA | YTD Feb. 2023P | YTD Feb. 2019 | % Change |
|---|-----------------------|----------------------|-----------------|
| Visitor Expenditures (\$ Millions) | 101.9 | 338.9 | -69.9% |
| Visitor Days | 429,822 | 1,406,768 | -69.4% |
| Arrivals | 58,955 | 241,071 | -75.5% |
| Average Daily Census | 7,285 | 23,844 | -69.4% |
| Per Person Per Day Spending (\$) | 237.0 | 240.9 | -1.6% |
| Per Person Per Trip Spending (\$) | 1,727.7 | 1,405.7 | 22.9% |
| Length of Stay (days) | 7.29 | 5.84 | 24.9% |

DIRECT CONSUMER INITIATIVES

- Shibuya digital sinage to showcase Mālama Hawai'i message
- Taxi signage advertisement placed to target affluent market
- Digital marketing to diffuse Mālama messages and island branding

Generated
41,634,210 Reach
41,765,992 Impression



DIRECT CONSUMER INITIATIVES

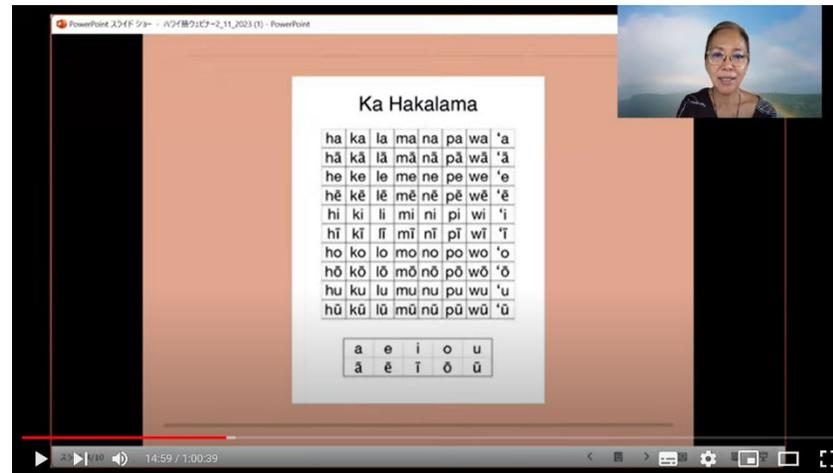
- 750,000 Calbee's Konin (certified) product "Frugra Tropical Coconut" sold (Feb – August 2023)
- 336 Hawai'i specialists attended to 'Ōlelo Hawai'i webinar
- Advertising campaign conducted with Expedia generating 11.4 million impression



Calbee Frugra



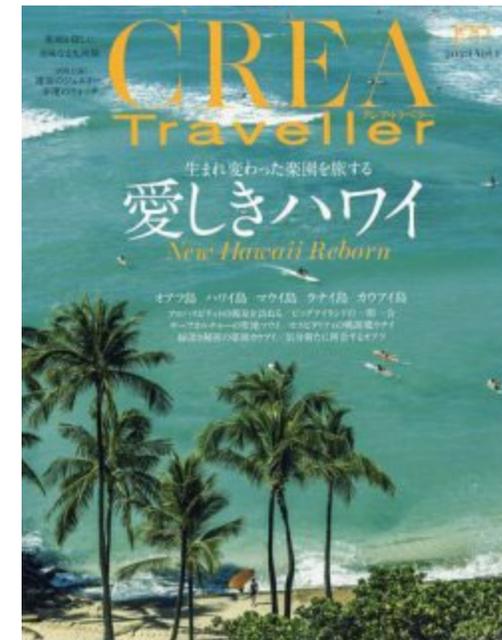
'Ōlelo Hawai'i webinar



Expedia Campaign

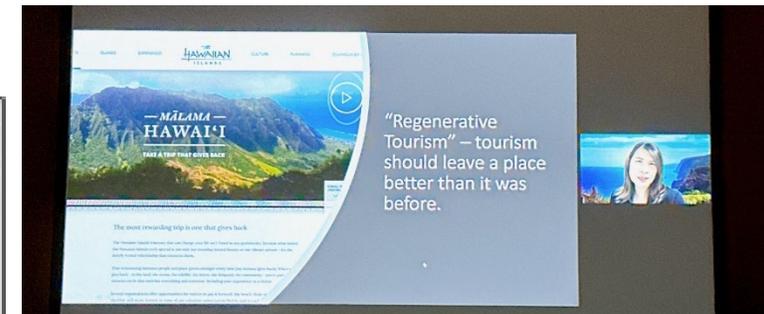
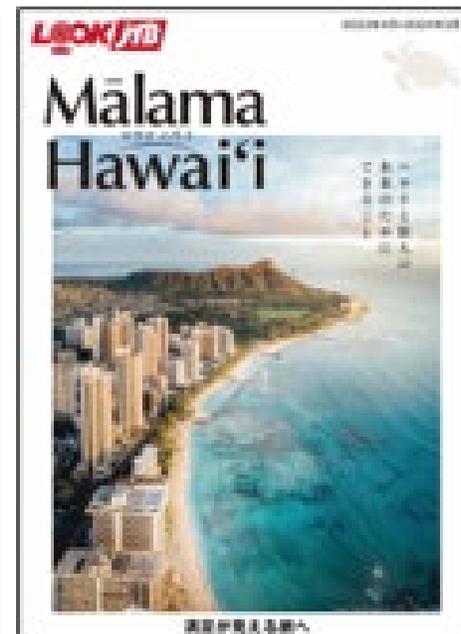
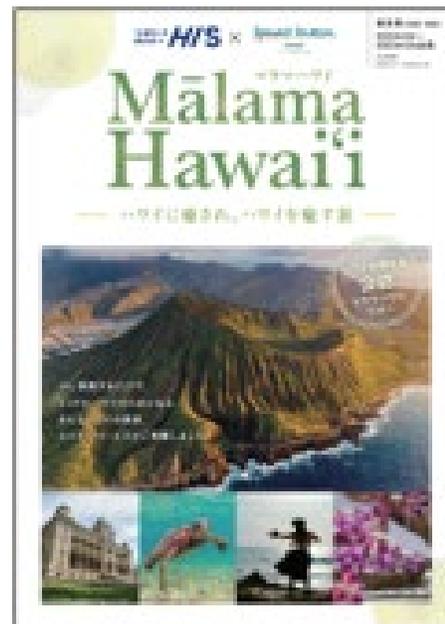
MEDIA EXPOSURE

- 188 media correspondence in Q1
- TV, print, online exposures generating more than \$2.6 billion in value
- 184 media participated in online media webinars



TRAVEL TRADE

- Conducted FAM tours including volunteer work
- Online education to industry partners, DMO, federation, and students
- Mālama Hawai'i Package creation by major travel agencies



BMP UPDATE



MĀLAMA HAWAI'I CAMPAIGN

Elevate Hawai'i's brand positioning by inspiring the mālama concept to keep the Hawaiian Islands top of mind while improving sentiment for travel abroad. HTJ will place digital, SNS, taxi ads, and out-of-home advertisement.



ROMANCE PROMOTION

- Collaborate with wedding association stakeholders
- Wedding page renewal
- Promotional video creation
- Neighbor islands promotion



GOLF PROMOTION

- Neibor island golf course promotion
- Golf page renewal
- Collateral creation
- Promotional video creation



OTHER CONSUMER INITIATIVES

- Collaborate with stakeholders to create an authentic Hawai'i experience in the Japan market
- Partner with well-known nationwide companies to draw on the power of their consumer data
- Provide educational programs to learn about Hawai'i and its culture



TRAVEL TRADE INITIATIVES

- Provide networking and relationship building opportunities for Island Chapters and local suppliers with key industry partners and stakeholders in the Japan market (Japan Summit 4/21 & Japan Mission 11/21-11/22)
- Conduct educational seminars and cultural workshops to provide ideas to develop travel products





**PARTNERSHIP
OPPORTUNITIES**

PARTNERSHIP OPPORTUNITIES

| ACTIVITY | DATE | DESCRIPTION | LOCATION | COST |
|---|--------------------------|---|--|---------------|
| TRADE SHOWS | | | | |
| Japan Summit | April | Provide opportunity for stakeholders and travel agents to accelerate tourism recovery and create new tour products through Mālama Hawai'i initiatives | O'ahu | In Kind |
| Hawai'i Seminar & Mahalo Reception | Mid-November | Provide latest information to travel agents and strengthen relationship with stakeholders; develop new Mālama Hawai'i and regenerative tourism related products | Tokyo Osaka Online | In Kind |
| Japan Mission | Mid-November | Share Hawai'i updates including DMAP initiatives and progress by island; boost development of new travel products for each island | Tokyo | Information |
| TRADE FAMILIARIZATION TRIPS (FAMS) | | | | |
| HIS MOU Mālama Hawai'i FAM (with airlines and HIS) | February | Educate HIS Hawai'i Trainer on Mālama Hawai'i and experience regenerative tourism related activities to develop new products for spring and Golden Week | O'ahu, Maui | In Kind |
| Collaboration Edu-tourism FAM (with airlines) | March | FAM tour for school representatives to learn how Hawai'i is the ideal destination for Edu-tourism by experiencing voluntourism activities | O'ahu | In Kind |
| Japan Summit Mālama Hawai'i FAM(planning staffs, in-store sales staffs, travel trade media) | April | FAM tour for key industry partners to experience unique activities under the Mālama Hawai'i initiative and connect with NPOs to develop new tour products | O'ahu | In Kind |
| Romance FAM | April | FAM tour for wedding planners/production companies to showcase ideal venues and activities to develop new tour products for couples and families | O'ahu | In Kind |
| Satellite Office (leisure) | October | FAM tour for leisure group to experience unique Mālama Hawai'i activities, boost booking pace and conduct B to C seminars at Satellite Office locations | O'ahu Island of Hawai'i | In Kind |
| On Island Mālama Hawai'i FAM Activity Support | January to June | Support FAM tour organized by major wholesalers (HIS, JTB, JALPAK) to experience Mālama Hawai'i to deepen understanding and develop new tour products | Hawai'i (Islands: TBD) | Information |
| TRAVEL TRADE EDUCATION | | | | |
| Educational Seminar Blitz | January, June, September | Collaborate with Hawai'i Promotion Committee Japan (HPCJ) to conduct trade educational seminars in target cities on regenerative tourism while sharing the latest updates | Fukuoka Tokyo Nagoya Osaka Sapporo | Information |
| Hawai'i Trainer Program | Throughout the year | Advance JTB / HIS Hawai'i Specialists to trainer status to develop in-house curriculum on Mālama Hawai'i initiatives and develop new tour products | Japan / Hawai'i | Information |
| Webinar | Throughout the year | Provide latest Hawai'i updates to travel agents and sales staff, build strong relationship with stakeholders and develop new products | Online | Complimentary |

PARTNERSHIP OPPORTUNITIES

| ACTIVITY | DATE | DESCRIPTION | LOCATION | COST |
|------------------------------|---------------------|---|------------------|-----------------------|
| CONSUMER PROMOTIONS | | | | |
| Konin (Certified) Program | Spring-Summer | HTJ's certified program with Japan corporations to amplify Hawai'i's brand to reach the general public | Japan | In Kind |
| Influencer Collaboration | April - October | Leverage influencer's reach to increase awareness of mālama mindset | Hawaiian Islands | In Kind / Information |
| SNS Promotion Campaign | Throughout the year | Share the latest Hawai'i information and educate Japanese consumers to be Pono Travelers | Online | Information |
| Hawai'i-made Promotion | Throughout the year | Expand awareness of Hawai'i-made products in the Japan market by conducting campaigns | Online | In Kind / Information |
| Allhawaii.jp | Throughout the year | Share information from industry partners and stakeholders on Hawai'i news and updates with direct consumers | Online | Information |
| Mālama Hawai'i Website | Throughout the year | Information on Mālama Hawai'i initiatives to educate visitors to be Pono Travelers and expand the awareness of regenerative tourism in the Japan market | Online | Information |
| Aloha Program | Throughout the year | Educational information on Hawaiian history, culture, music, Mālama Hawai'i initiatives, etc. for Hawai'i fans in Japan | Online | In Kind/ Information |
| E-Mail Magazine Distribution | Throughout the year | Monthly E-mail magazine for general consumers, travel trade members, and Aloha Program members | Online | Information |
| CONSUMER SHOWS | | | | |
| Hawai'i Expo | May | Annual event that attracts both first timers and repeaters to Hawai'i including neighbor islands through Mālama Hawai'i initiatives | Tokyo | In Kind / Information |
| Event Endorsement | Throughout the year | Educate the Mālama Hawai'i concept to event organizers in Japan and offer brochures and materials to select Hawai'i events across Japan | Japan | Information |

Contact at Hawaii@htjapan.jp



A close-up photograph of hands holding a traditional Hawaiian braided leaf cord (lei). The cord is made of green leaves, intricately braided together. The hands are positioned at the ends of the cord, one holding it near the bottom and another near the top. The background is a soft, out-of-focus green, suggesting a tropical setting. The text "MAHALO NUI LOA!" is overlaid in the center in a bold, white, sans-serif font.

MAHALO NUI LOA!

HAWAII TOURISM
JAPAN