



Hawai'i Partner Meeting

August 16, 2023
Mitsue Varley
Japan, Country Director



- 1. Market condition**
- 2. Jan.~Jul. review**
- 3. Future initiatives**
- 4. 2024 initiatives**

PRAY FOR MAUI

An aerial photograph of a coastal marina on Maui, Hawaii. The marina is filled with numerous white sailboats and motorboats docked along a stone breakwater. The water is a vibrant turquoise color. In the background, there are lush green trees, a few buildings, and a clear blue sky. The overall scene is peaceful and scenic.

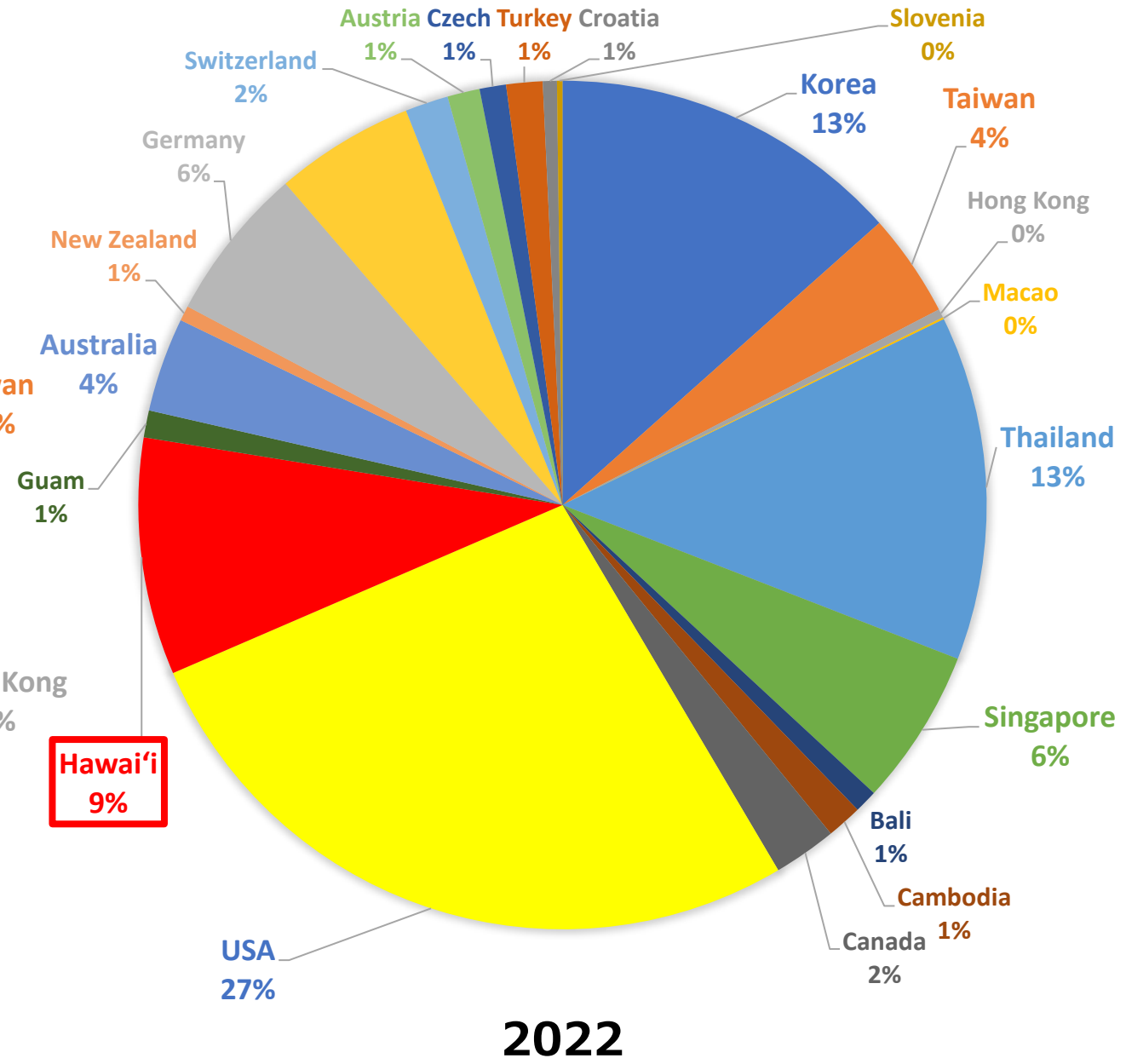
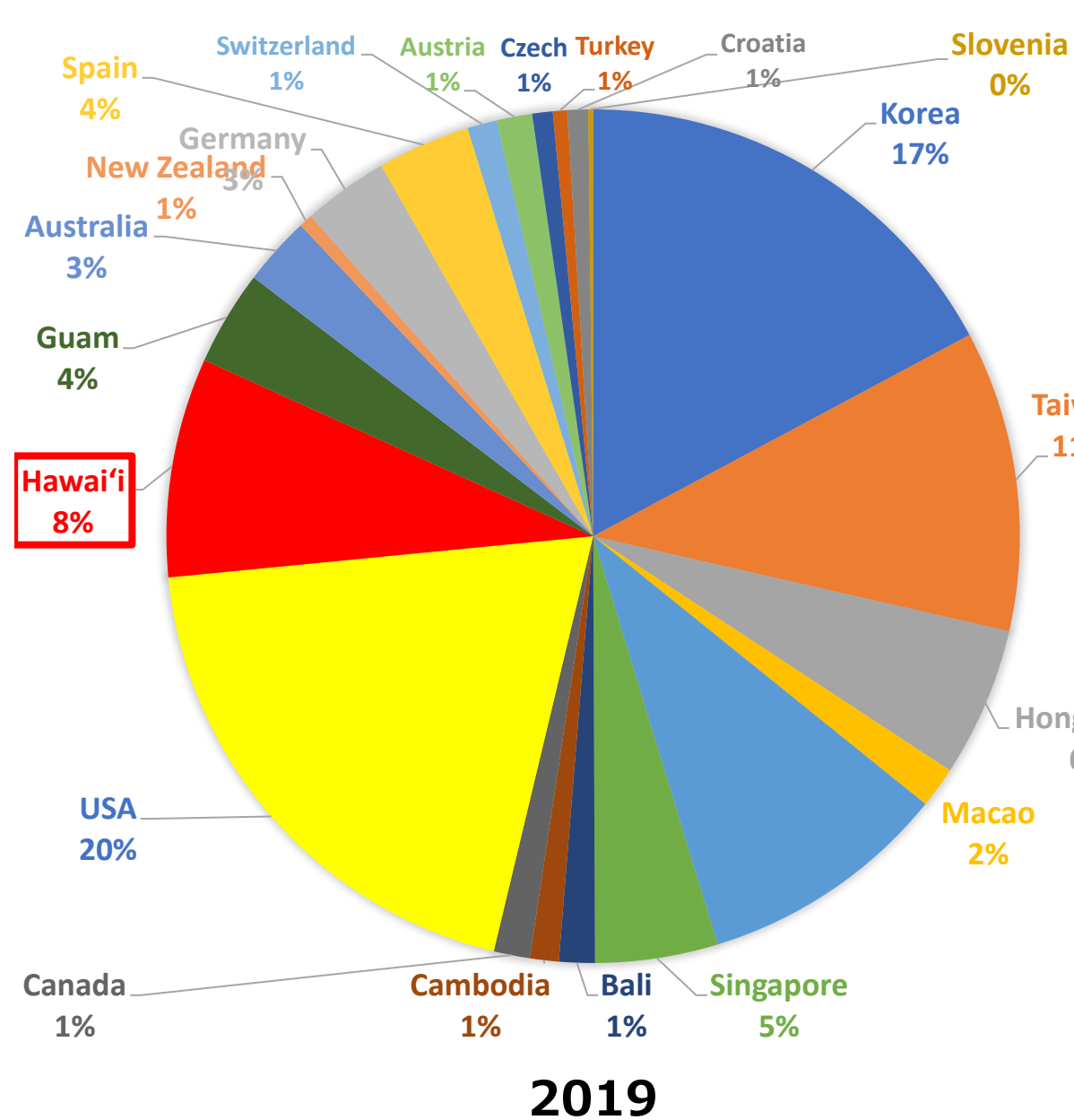
<https://www.allhawaii.jp/htjnews/5743/>



MARKET CONDITION



Japan Outbound Statistics

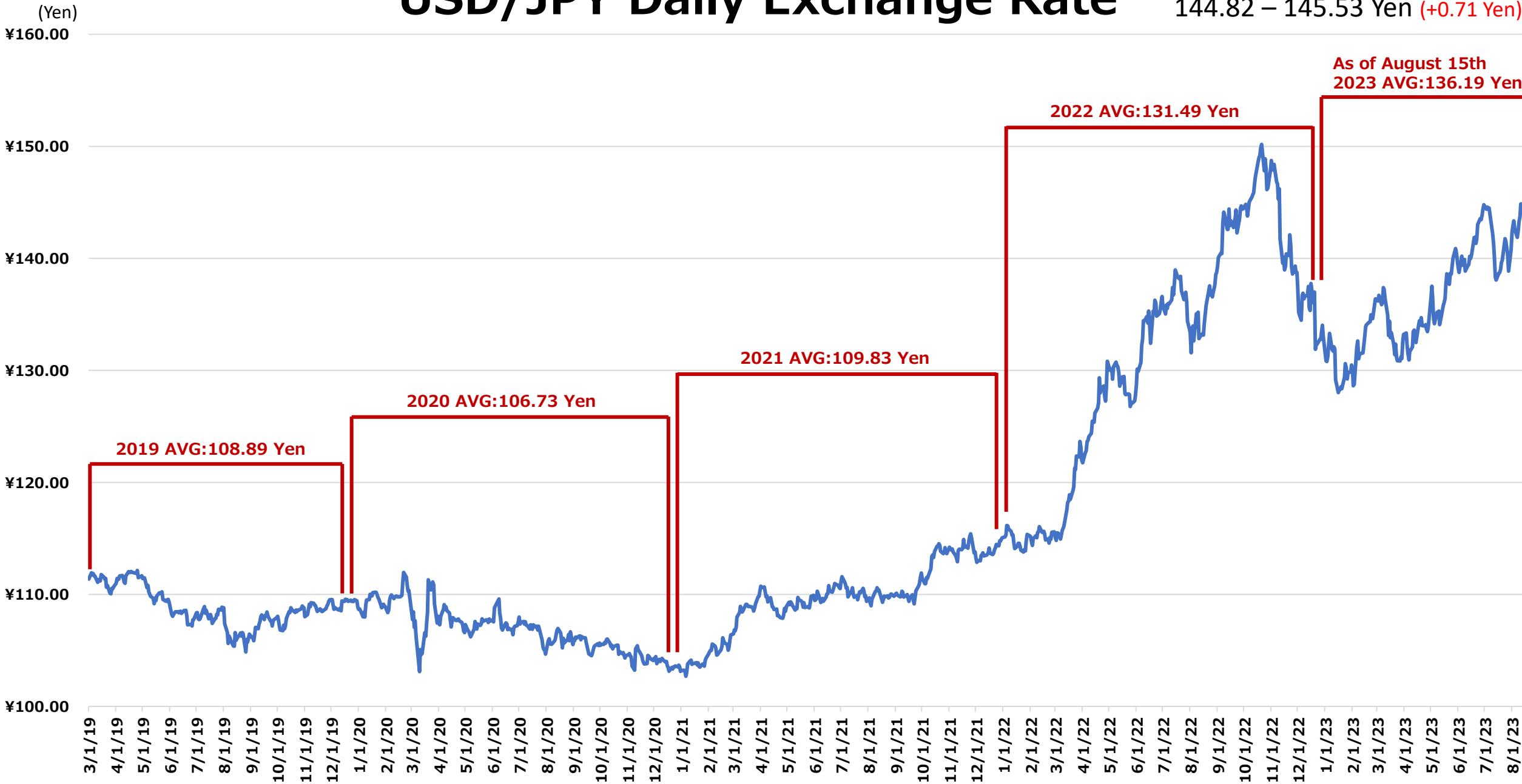


Fuel Surcharge

	Europe North America	Hawai'i India	Southeast Asia	Guam	China Taiwan	Korea
2023/8	¥50,000	¥32,000	¥26,000	¥16,000	¥14,000	¥5,000
2023/6	¥58,000	¥37,000	¥31,000	¥19,000	¥17,000	¥6,000
2023/4	¥66,000	¥42,000	¥36,000	¥22,000	¥20,000	¥7,000
2023/2	¥98,000	¥62,200	¥51,600	¥32,000	¥30,200	¥11,200
2022/12	¥98,000	¥62,200	¥51,600	¥32,000	¥30,200	¥11,200
2022/10	¥116,000	¥73,400	¥60,000	¥37,400	¥36,000	¥13,400
2022/08	¥98,000	¥62,200	¥51,600	¥32,000	¥30,200	¥11,200

USD/JPY Daily Exchange Rate

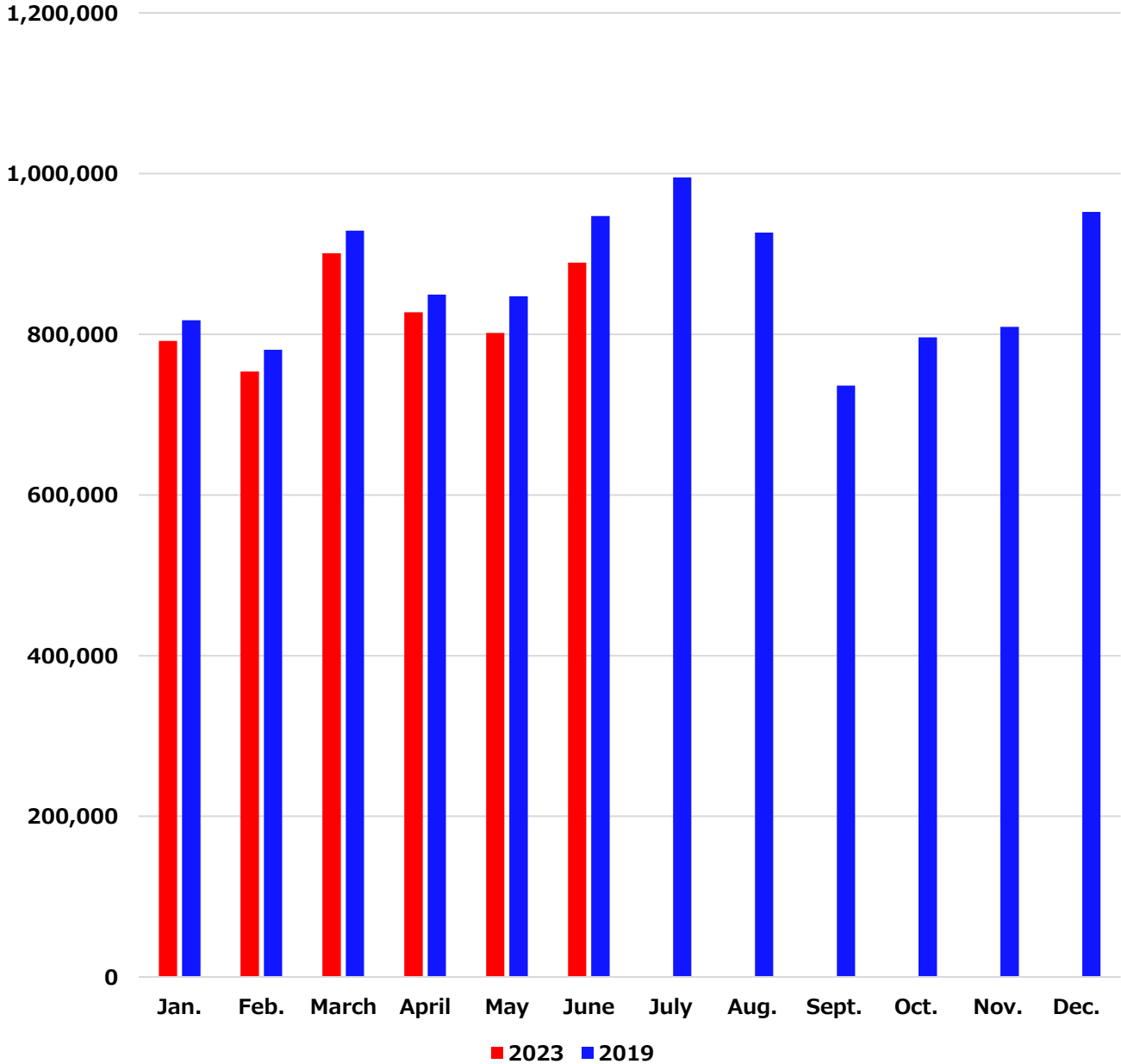
144.82 – 145.53 Yen (+0.71 Yen)



Source: Yahoo Finance, USD/JPY Exchange Rate Data 2023

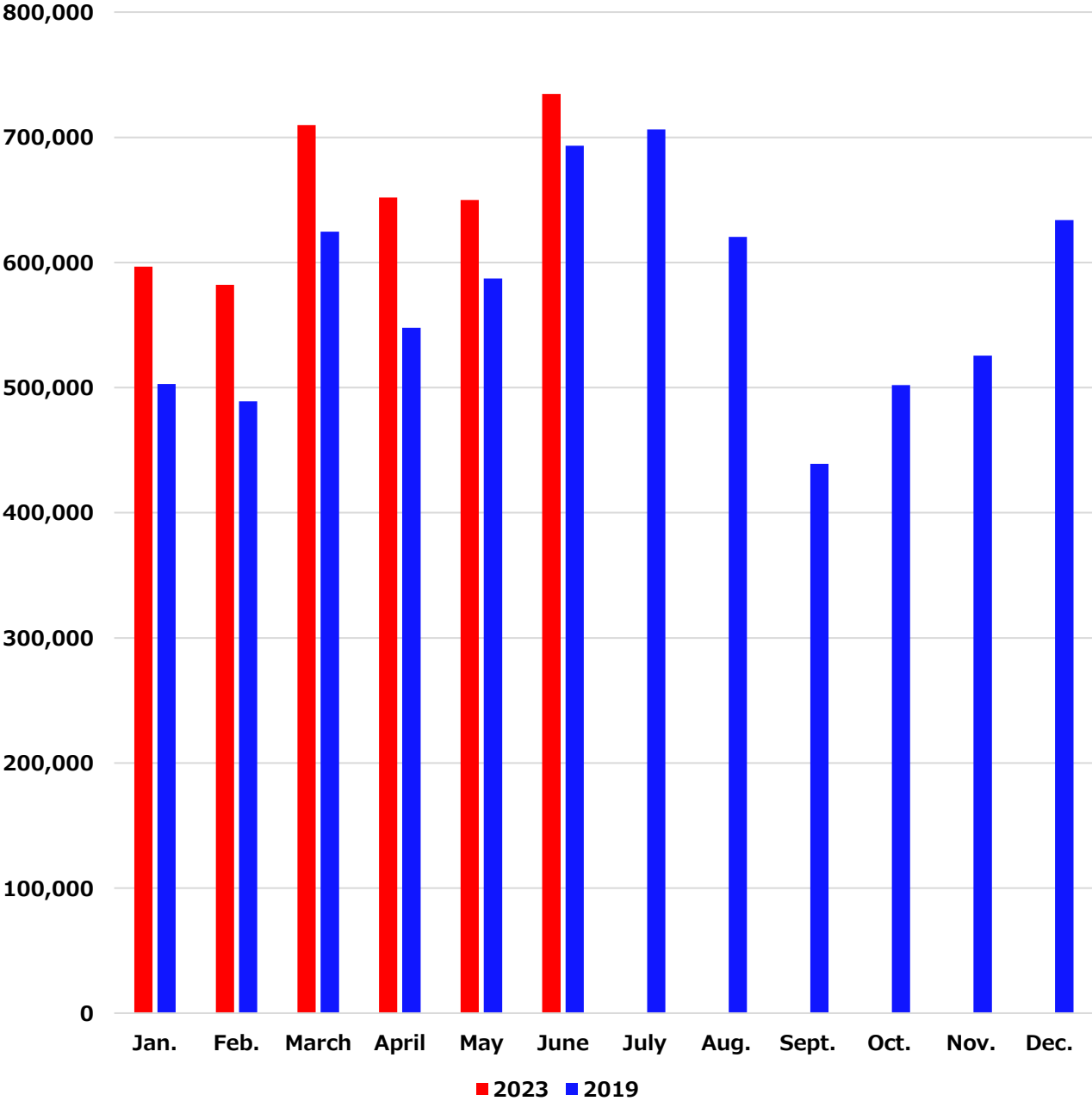
Total Visitor Arrival Analysis 2023 vs 2019

Month	2023	2019	% vs 2019
Jan.	791,781	817,600	-3.16%
Feb.	753,750	780,827	-3.47%
March	900,800	928,849	-3.02%
April	827,537	849,398	-2.57%
May	801,569	847,396	-5.41%
June	889,274	947,112	-6.11%
July		995,210	
Aug.		926,417	
Sept.		736,155	
Oct.		796,191	
Nov.		809,076	
Dec.		952,441	
Until June	4,964,711	5,171,182	-3.99%



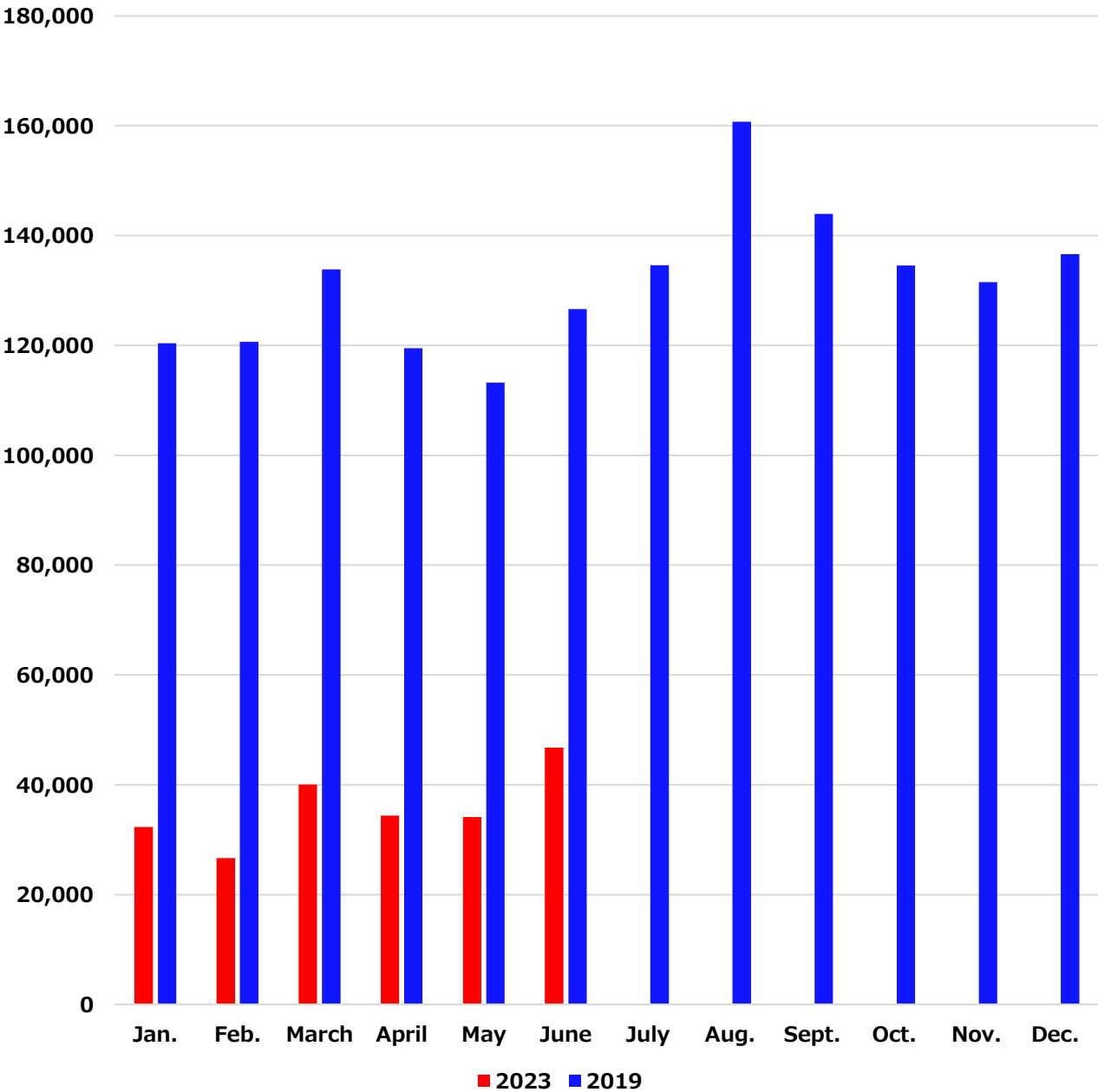
US Market Visitor Arrival Analysis 2023 vs 2019

Month	2023	2019	% vs 2019
Jan.	596,637	502,908	18.64%
Feb.	582,065	489,011	19.03%
March	709,761	624,697	13.62%
April	651,810	547,688	19.01%
May	649,964	587,188	10.69%
June	734,669	693,181	5.99%
July		706,174	
Aug.		620,409	
Sept.		438,993	
Oct.		502,082	
Nov.		525,630	
Dec.		633,878	
Until June	3,924,906	3,444,673	13.94%

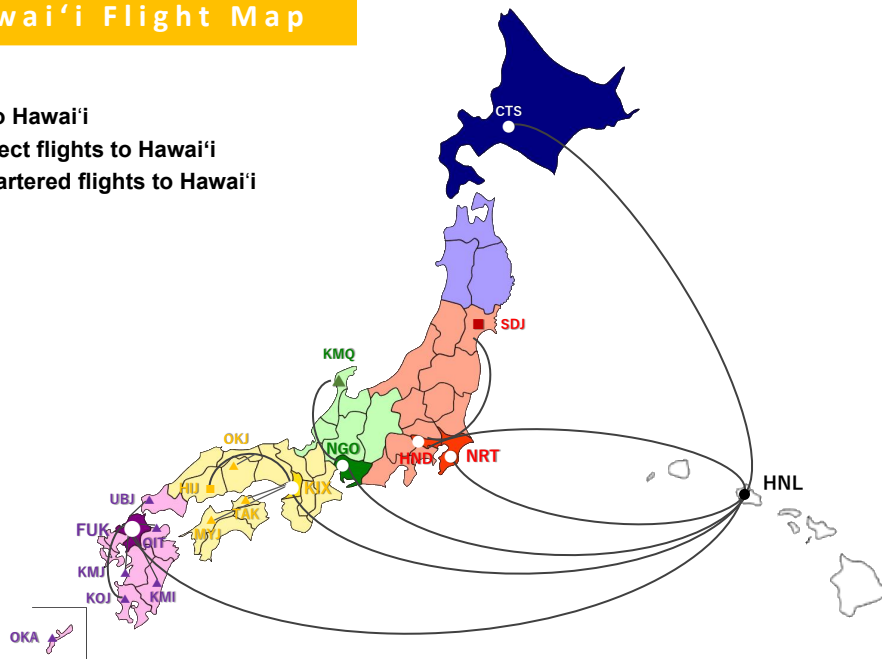


Japan Market Visitor Arrival Analysis 2023 vs 2019

Month	2023	2019	% vs 2019
Jan.	32,305	120,418	-73.17%
Feb.	26,650	120,653	-77.91%
March	40,039	133,858	-70.09%
April	34,358	119,487	-71.25%
May	34,141	113,226	-69.85%
June	46,753	126,592	-63.07%
July		134,587	
Aug.		160,728	
Sept.		143,928	
Oct.		134,557	
Nov.		131,536	
Dec.		136,635	
Until June	214,246	734,234	-70.82%



- 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-Aug	373	666	-44.0%	104,250	179,764	-42.0%
23-Sept	331	641	-48.4%	94,591	171,968	-47.9%
23-Oct	355	620	-42.7%	100,932	166,311	-39.3%
Total	1,068	1,927	-44.6%	302,383	518,043	-41.6%

Seats

Carrier	Dep. City	Arr. City	Aug	Sep	Oct
All Nippon Airways	Tokyo HND	HONOLULU	7,626	7,380	7,626
	Tokyo NRT	HONOLULU	26,696	22,360	22,646
Hawaiian Airlines	Fukuoka	HONOLULU	3,614	3,614	3,614
	Osaka	HONOLULU	8,340	8,340	8,618
	Tokyo HND	HONOLULU	15,290	14,456	15,568
		KONA	0	0	278
	Tokyo NRT	HONOLULU	8,062	6,950	7,506
Japan Airlines	Nagoya	HONOLULU	2,630	2,869	3,041
	Osaka	HONOLULU	4,090	3,798	4,289
	Tokyo HND	HONOLULU	14,818	14,340	14,818
	Tokyo NRT	HONOLULU	6,437	6,714	6,913
		KONA	2,587	0	597
ZIPAIR	Tokyo NRT	HONOLULU	6,670	3,770	3,770



JAN.~ JUL. REVIEW

4/21-4/23 at Hawai'i Convention Center
26 Japanese travel agencies (**82** people)
94 Hawai'i local marketing partners (**180** people)

Japan Summit



Mālama Hawai'i campaign



Press Conference
5/19/2023
221 participants





Advertisement (OOH & Digital)



Odakyu & Tokyu & Toei Line

June & July

62,706,630 Impression



4,803,012 Reach



June~August

1,250,066 Impressions



Taxi Ad.

July

4,094,139 Impression 3,803,012 Reach



Station Board

Aug.~

6,419,441 Impression 5,215,553 Reach

Hawai'i EXPO 2023



5/27-5/28 at Shibuya Hikarie

Event participants: 12,146

Exhibitors: 50

NPO donation: 1,101,000 yen

Private Sector Collaboration



Calbee Frugra Tropical Coconut Flavor

Tohato Poteko & Caramel Corn

Yamazaki Lunch Pack



Seven Eleven World Gourmet Fair

Japan summit FAM
Travel agent training FAM
Edu tourism FAM

FAM Tours



Held in Itoman, Okinawa (3/11/2023)
235 people attended (2,225 total in 9 cities from May)



Hōkūleʻa Screening



ポリネシア航海協会 タミコ・ファネ
リアス氏インタビュー



ポリネシア航海協会 内野加奈子氏
インタビュー



ポリネシア航海協会 ナイノア・トン
ブソン氏インタビュー

ポリネシア航海協会ホクレア情報サイト

Hōkūleʻa

THE HAWAIIAN ISLANDS

ホクレアについて

航海プロジェクト

伝統航海の広がり

最新情報

サポート情報

寄付をする

一覧へ戻る

ホーム / 最新情報 / ホクレアクルーによるインタビュー動画

ホクレアクルーによるインタビュー動画

2026年5月1日、ホクレアは初航海から50周年を迎えます。2023年6月から出発した太平洋横断「モアヌイアケア航海」の乗組員にホクレアクルーにインタビューを行いました。

- 307 media correspondence
- TV, print, online exposures generating \$64 million in value
- 244 media participated in online media webinars

Media Exposure



Sister city Summit (July 27-28 in O'ahu)



State of Hawai'i

Fukuoka Pref.
Okinawa Pref.
Ehime Pref.
Hokkaido
Yamaguchi pref.

County of Hawai'i

Oshima town
Nago city
Yurihama town
Shibukawa city
Sumoto city
Kumejima town

C&C of Honolulu

Hiroshima city
Naha city
Shirahama town
Saeki city
Uwajima city
Nagaoka city
Sakai town
Usa city
Kin town
Edogawa city
Miura city

County of Maui

Miyako city
Hachijo town
Fukuyama city

County of Kaua'i

Ishigaki city
Suo-Oshima town
Moriyama city
Iwaki city



Business & Economy / Sustainable Energy / Sustainable Tourism /Education

FUTURE INITIATIVES



New Campaign Proposal



Co-op Program
Airline, OTA, Whole sale

Romance Promotion

- Collaborate with wedding association stakeholders
- Wedding page renewal
- Promotional video creation
- Special Campaign & Event



Website

Advertisement

Event

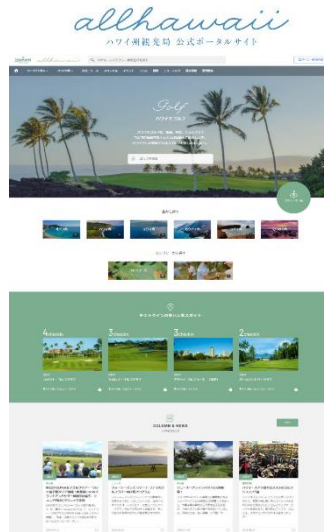
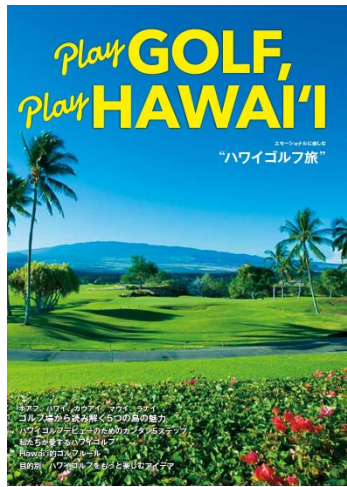


Golf Promotion

- Golf page renewal
- Collateral creation
- Promotional video production
- Database targetting campaigns



Tools



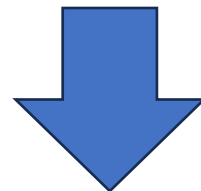
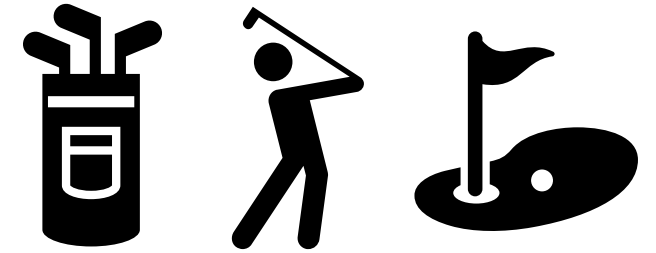
Campaign



TACHIBANA ENTERPRISES
タチバナエンタープライズ
Enjoy Golf in Hawaii

Rakuten
GORA

Event



Affluent Market

Date: 11/21-11/22, 2023
Location: Tokyo (Imperial Hotel)

Japan Mission

***Media Event & Mahalo Reception on 11/21, Seminar & B2B session on 11/22**

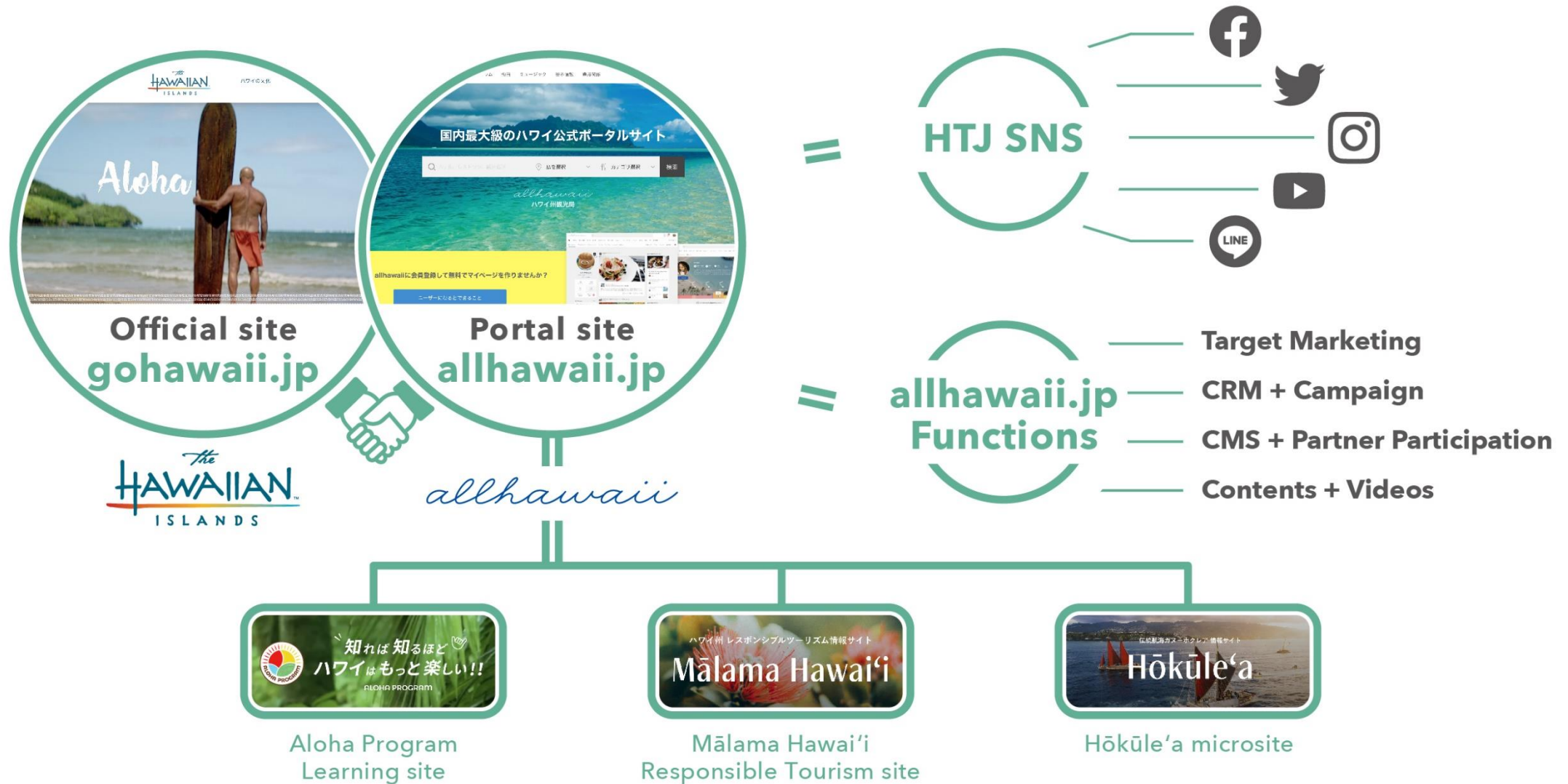


Press Tour & Educational FAM



Experience authentic Hawai'i
Develop new school trips in Hawai'i

Hawai'i Tourism Japan Digital Platform



An aerial photograph of a tropical coastline. In the foreground, the turquoise ocean is visible, with a small, dark, rocky island in the lower-left. The coastline curves along the middle of the image, featuring a sandy beach and lush green vegetation. In the background, a range of steep, green mountains rises against a blue sky filled with white, fluffy clouds. The text "2024 INITIATIVES" is overlaid in white, bold, sans-serif font on the left side of the image.

2024 INITIATIVES

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



Japan Market Strategy

- Accelerate recovery efforts by regaining direct flight access and implementing targeted promotions to build travel momentum
- Showcase Hawai'i's brand appeal over competing destinations
- Strengthen content of on-demand media
- Educate travel agent staff on the latest Hawai'i information through various educational programs.
- Work with local organizations for sister city relations, business relations and study abroad programs
- Drive multi-island visitations



Major Initiatives

- Japan Market Recovery Initiatives
- Beautiful Hawai'i Phase 2 Advertising Campaign
- Digital Marketing
- Romance & Golf Promotions
- Direct Consumer Events
 - Hawai'i EXPO
 - JATA Tourism EXPO
- Japan Summit
- Japan Mission
- Sister City Project
- Aloha Program



MAHALO NUI LOA!

HAWAII TOURISM
JAPAN