



2018  
**GLOBAL  
TOURISM  
SUMMIT**

**HAWAII TOURISM**  
AUTHORITY

*Charting the  
Course*

#GTSHAWAII



**OCTOBER 1-3**  
HONOLULU, HAWAII



# *Global Tourism Summit 2018*

## *Japan Market*

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# Session overview

1.  Japan market update
2.  Major opportunities
3.  2019 Leisure initiatives
4.  2019 MICE initiatives
5.   Responsible tourism
6.  Top takeaways





*Japan market update*

# Japan market trends

## Japan's economy



**2.5%**

**Unemployment rate**

**¥111**

**Exchange rate**



# *Japan market trends*

## **Japan's economy**



**43.5%**

**Consumer confidence**

**10%**

**Consumption tax  
increase**



# Japan market trends



## Hawai'i price positioning



Okinawa (3 nights)      ¥ 41,750      \$ 417.50

Taiwan (3 nights)      ¥ 35,988      \$ 359.88

Korea (3 nights)      ¥ 28,950      \$ 289.50

Bankok (4 nights)      ¥ 56,138      \$ 561.38

Guam (4 nights)      ¥ 94,850      \$ 948.50

Saipan (4 nights)      ¥125,208      \$1,252.08

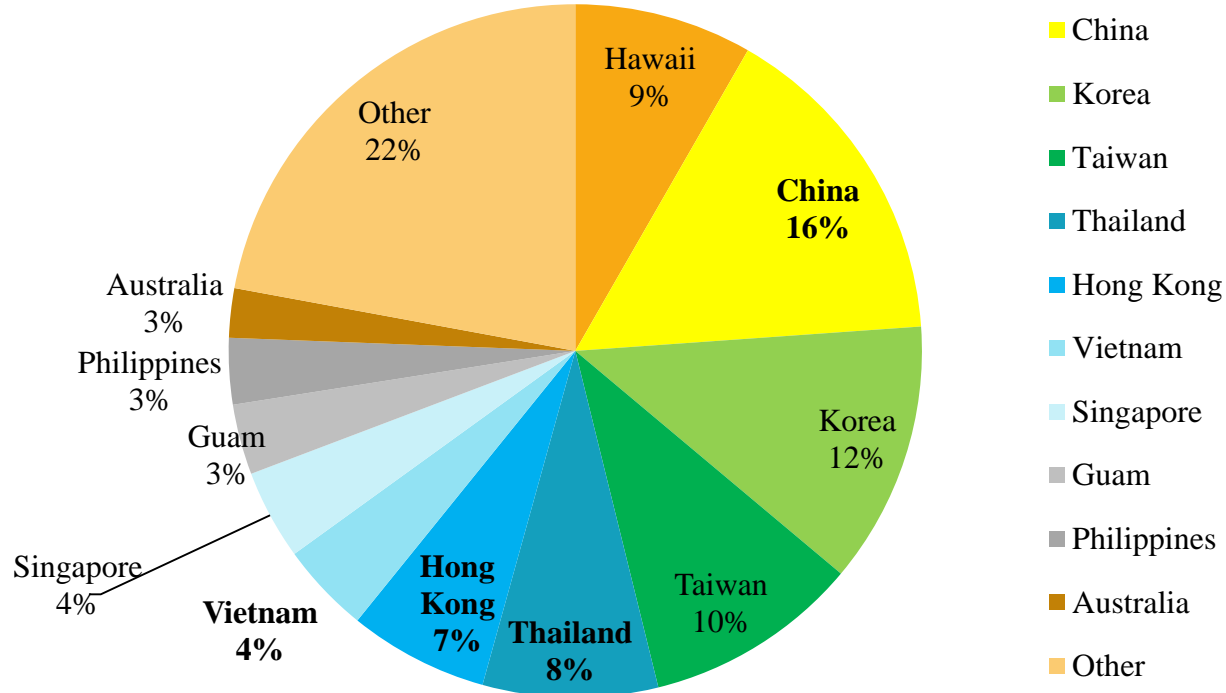
Australia (3 nights)      ¥152,400      \$1,524.00

**Hawai'i**      **¥162,600**      **\$1,626.00**



# Japan market trends

## 2017 Japan outbound travel market

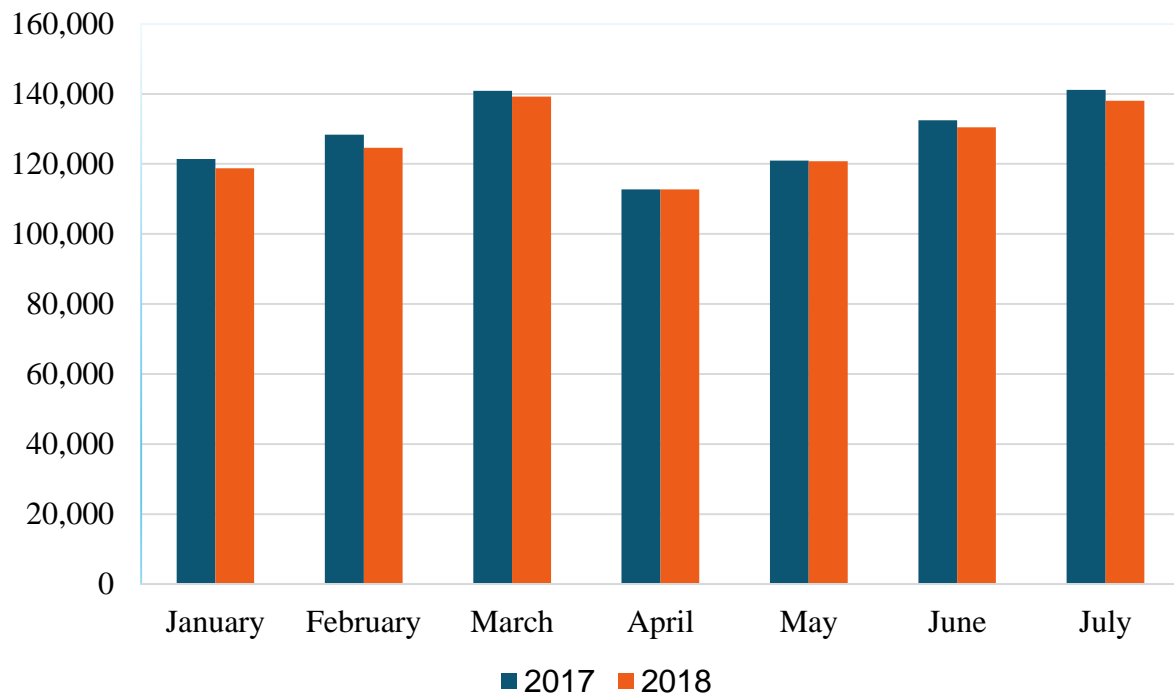




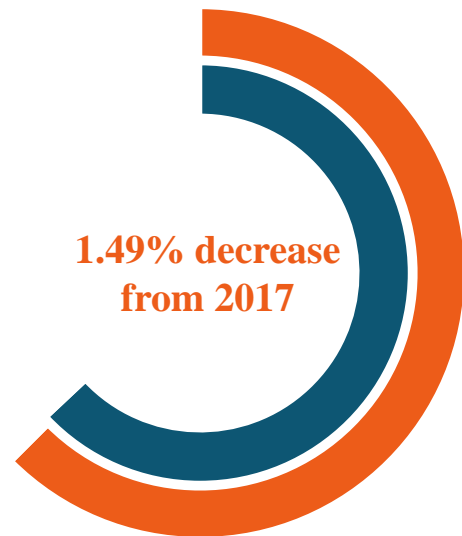
# Japan market trends



## Japan visitor highlights



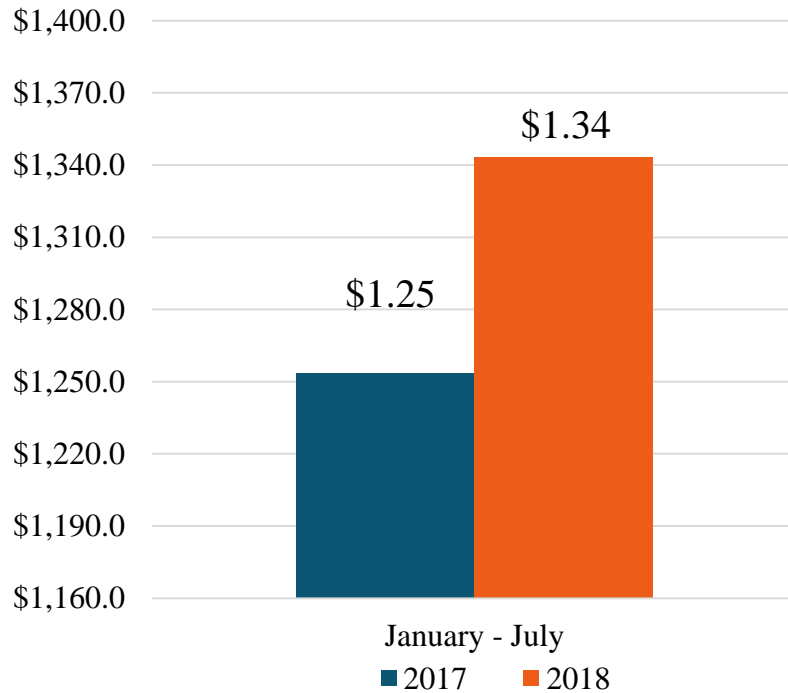
884,644 visitor arrivals



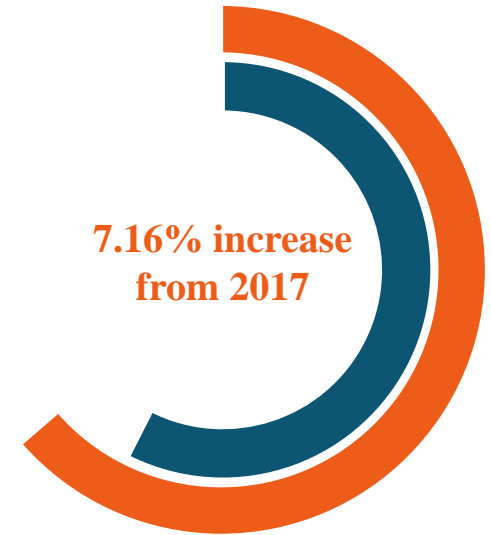
# Japan market trends



## Japan visitor highlights



\$1.34 billion total expenditures

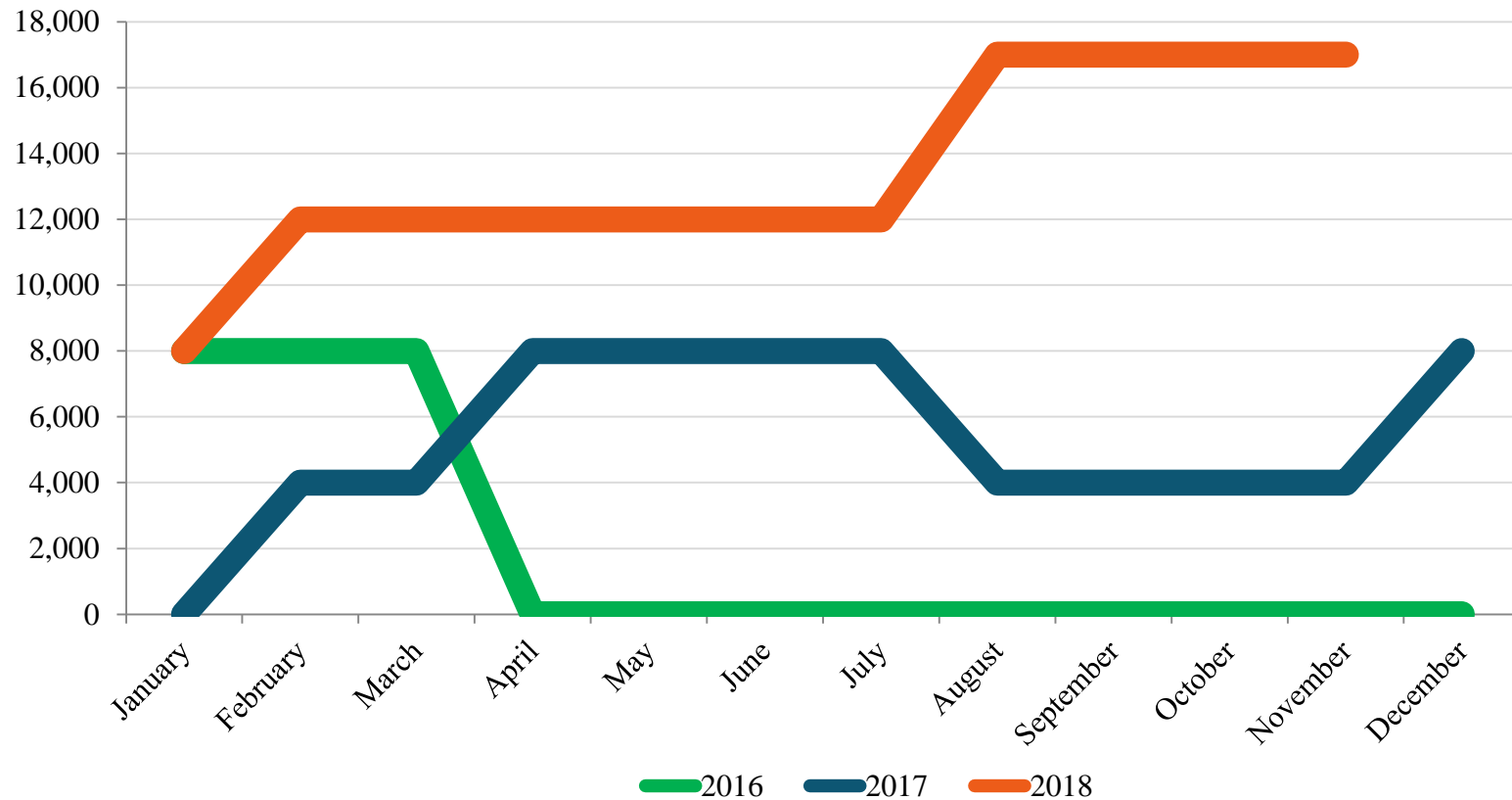


# Japan market trends



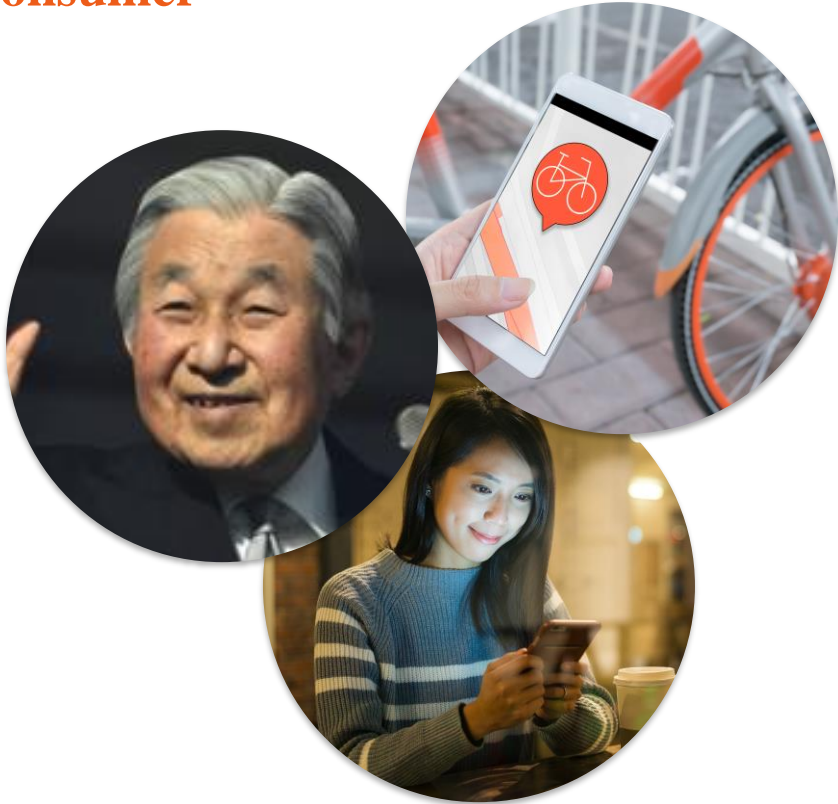
## Airlift

## Fuel surcharge rates (¥)



# *Japan market trends*

## **Consumer**



- Government initiatives
- Consumption habits
- Sharing economy
- Millennials



# *Japan market trends*

## **Travel trade**



Changing Japan  
visitor profile



Rapid growth  
of FIT market



Rise in repeat  
visitors



# Japan market trends

## Technology



IoT & AI



Technology for  
workforce development

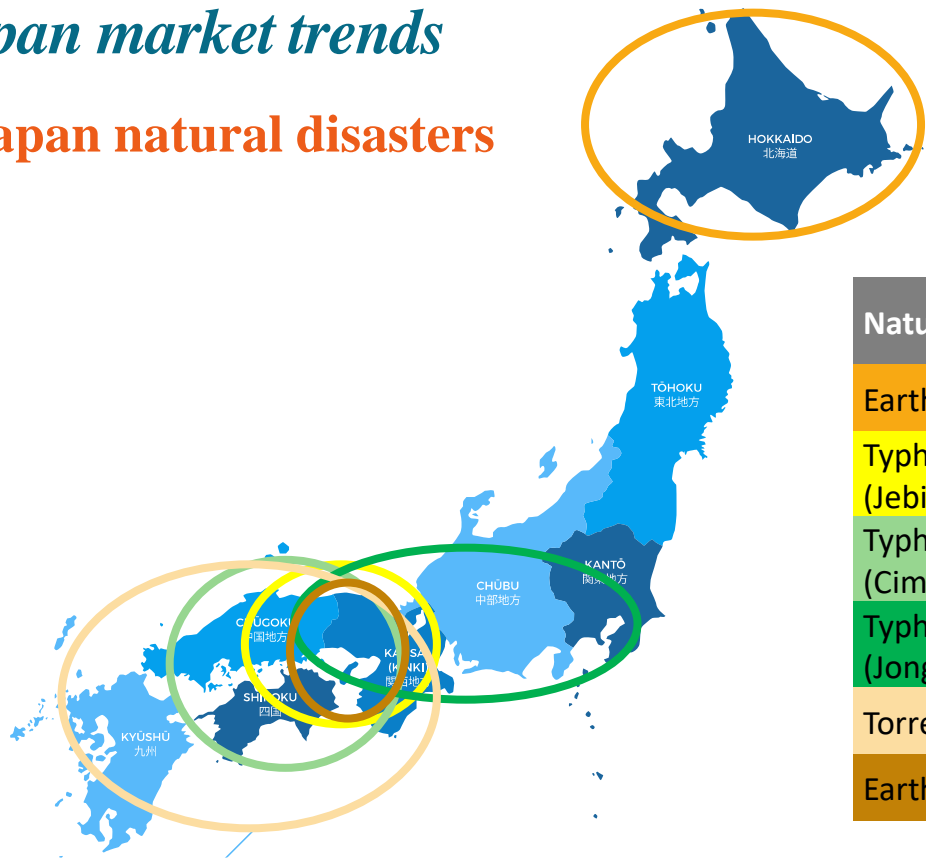


Virtual reality promotions



# Japan market trends

## Japan natural disasters



Natural Disasters	Dates (2018)	Area
Earthquake	9/9	Hokkaido
Typhoon 21 (Jebi)	8/28 - 9/5	Kinki
Typhoon 20 (Cimaron)	8/18 - 8/24	Kinki, Shikoku
Typhoon 12 (Jongdari)	7/25 - 8/3	Kinki, Kanto
Torrential Rains	6/28 - 7/9	Kinki, Chugoku
Earthquake	6/18	Kansai



# Japan market trends

## Airline



- Focus on Kona recovery efforts
- Regional cities potential/charter flights
- Increased competition anticipated in 2019
- Airbus A380 implementation by ANA

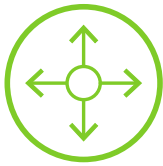






# *Major opportunities*

# Major opportunities



#1

JTB's Global Destination Campaign

#2

Eleven 3-day weekends

#3

Extended Golden Week



# Major opportunities



#4

Applying technology for targeted promotions

#5

Growing FIT market

#6

Rising world tourism population





*2019 Leisure initiatives*

# 2019 Leisure initiatives

1. Discover Hawai‘i Campaign
2. Neighbor Island Promotions
3. Affluent Market Promotion
4. Romance Market Program
5. Millennial Campaign
6. Aloha Program
7. Regional City First-Timer Promotions
8. Collaboration with Private Companies:  
“Konin” Program



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# 2019 Leisure initiatives



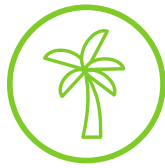
## Neighbor Island Promotions

	2017 Japanese Arrivals	2018 Forecast	2019 Goal
Hawai'i Island	189,551	210,000	230,000
Maui	57,738	59,600	60,800
Kaua'i	26,502	26,600	27,200
Moloka'i	2,515	2,540	2,590
Lāna'i	2,373	2,400	2,450



# 2019 Leisure initiatives

## Neighbor Island Promotions



### Goals

- Increase media exposure
- Apply digital marketing to raise awareness
- Educate consumers and agents
- Enhance product development
- Co-op with airlines, wholesalers and OTA
- Improve infrastructure

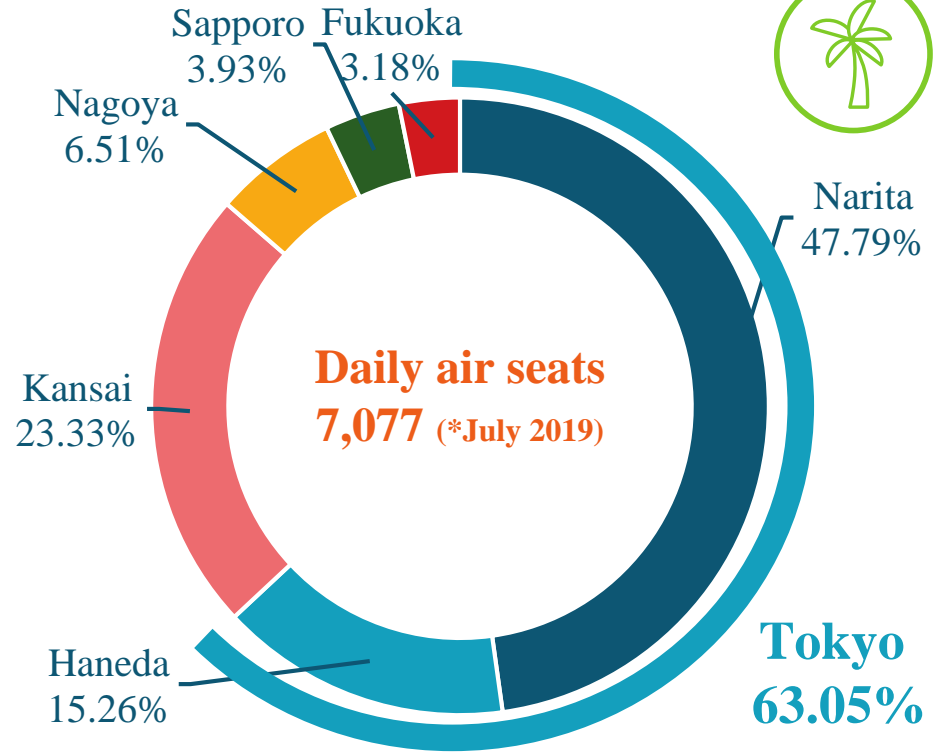


# 2019 Leisure initiatives

## Regional City First-Timer Promotions

### Initiatives

- Regional City Media + Travel Agencies + Airlines + HTJ Co-op Campaigns
- Satellite Office promotions
- Passport campaigns



1.89 of 2.14 million seats from Japan are expected to originate from two major regions





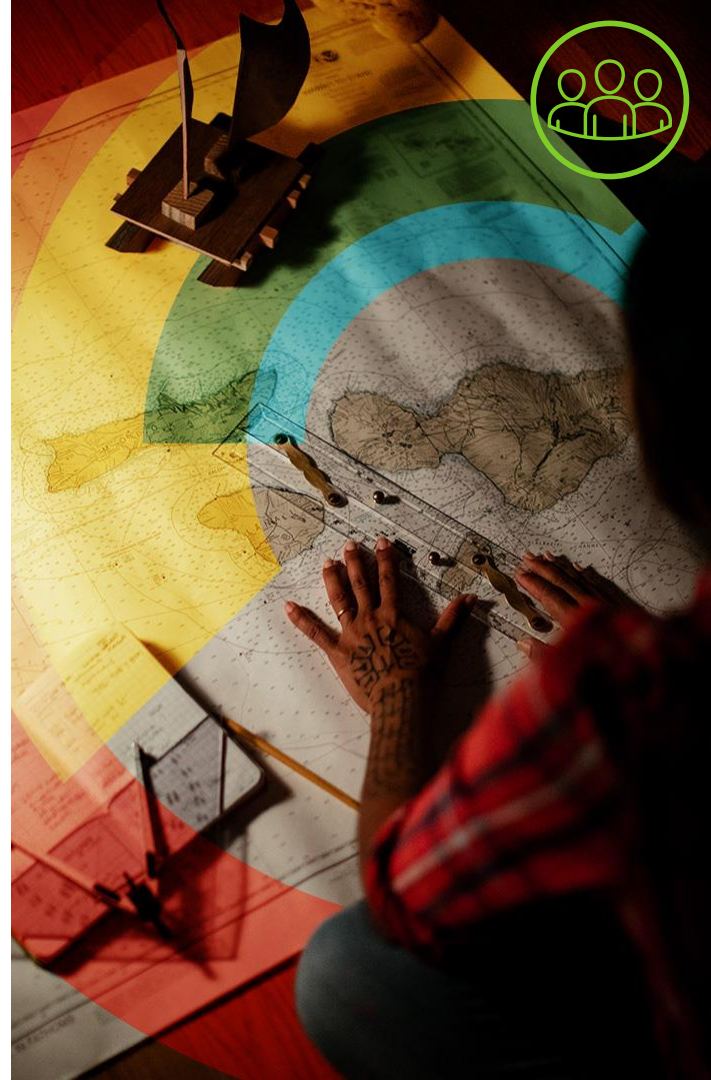


# *2019 MICE initiatives*



# 2019 MICE target pillars

1. Incentive
2. Edu-tourism
3. Sports
4. Entertainment
5. Attendance building





# *Responsible tourism*



# Responsible tourism



- Aloha Program's focus on Hawaiian culture
- Cultural FAM tours
- Development of cultural packages for first timers and repeaters



# Responsible tourism



- MICE edu-tourism and exchange program opportunities
- Partner with local nonprofits
- Collaborate with industry partners to develop responsible tourism products





# *Top takeaways*



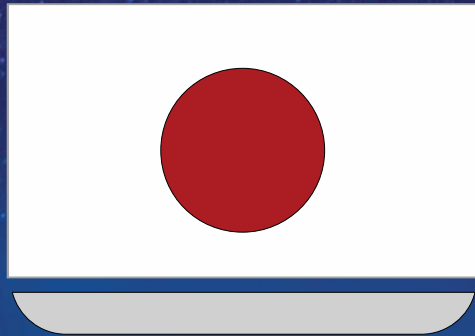
# Top takeaways



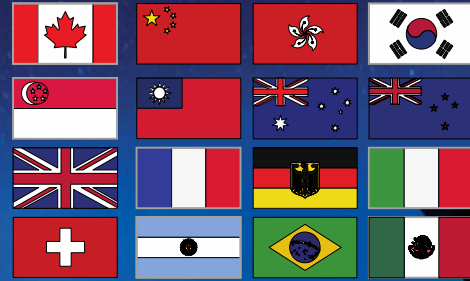
#1

## Japan is Hawai'i's top international market

JAPAN  
**1.59 M**  
VISITORS



REST OF THE  
INTERNATIONAL MARKET  
**1.85 M**  
VISITORS



Based on 2017 visitor arrivals



# Top takeaways



#2

## Danger of “business as usual” as Japanese visitors evolve



2006



2018



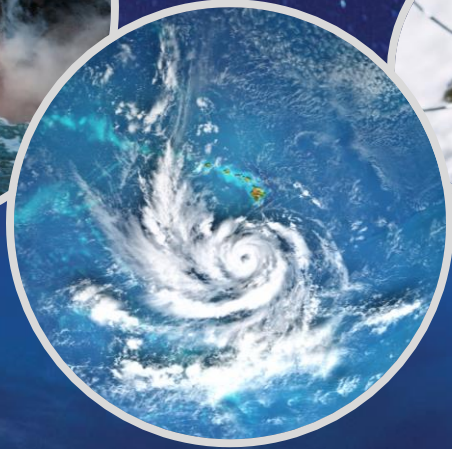


# Top takeaways



#3

## Weathering future storms



# *Questions?*

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