



HAWAII TOURISM

JAPAN

ハワイ州観光局

FALL TOURISM UPDATE

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MARKET CONDITIONS

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Market conditions

Japan's economic overview

0.3%

GDP growth
forecasted
(2020)

2.2%

unemployment
rate
(Jul 2019)
26-year low

1.2%

growth in
employee
compensation
(2020)

Market conditions

Currency exchange

107 ¥

exchange
rate
(Sep 2019)

37.1%

consumer
confidence
index
(Aug 2019)

10%

consumption
tax
(from Oct 2019)

Market conditions

Key trends

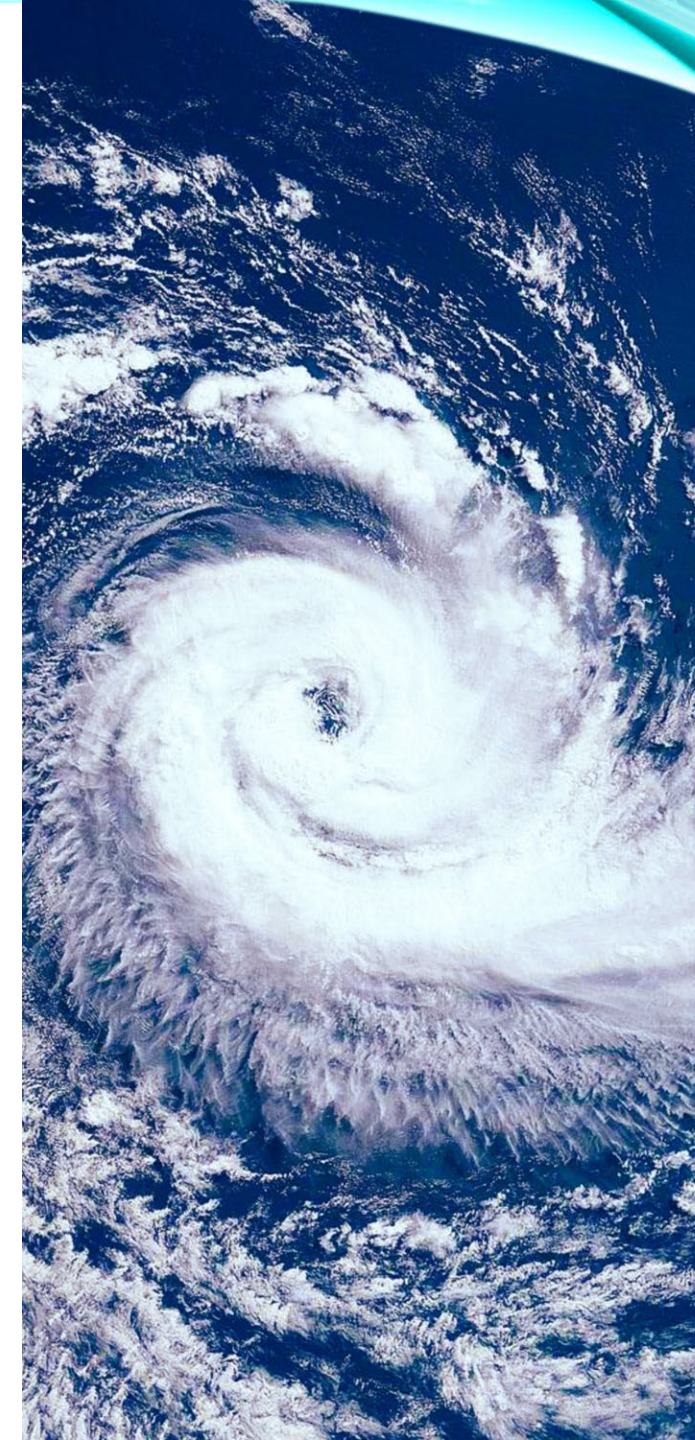
1. Global economic threats
 - US-China trade war
 - Escalating tensions between Japan and South Korea



Market conditions

Key trends

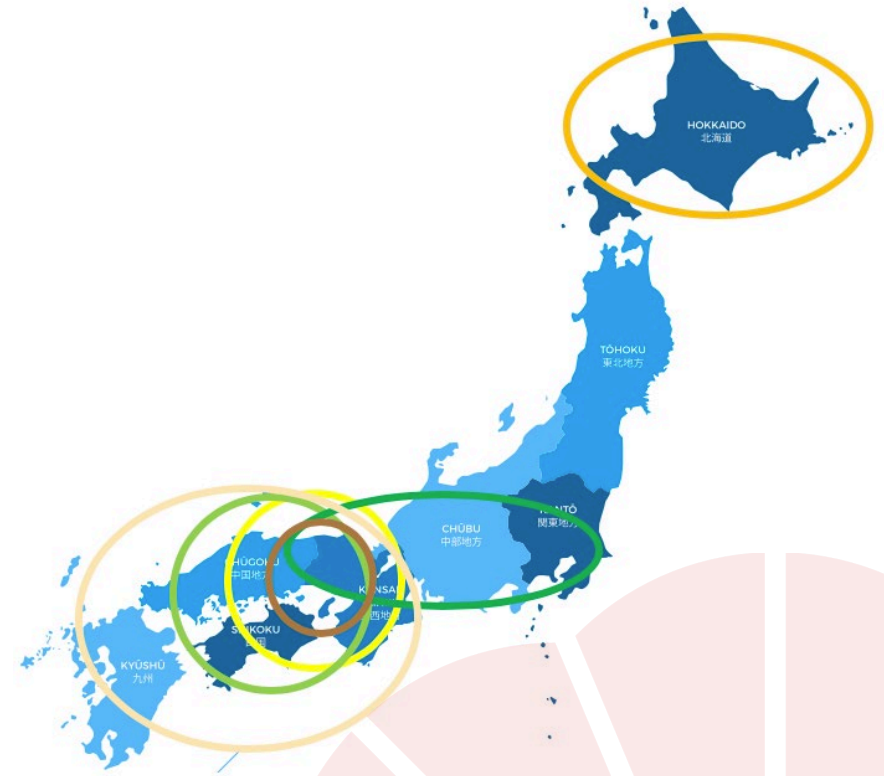
2. Japan's outbound travel instability
 - Consumption tax hike
 - Declining population
(lowest level in recorded history)
 - Inclination to save
 - Appeal of closer destinations
 - Natural disasters



Market conditions

Japan natural disasters (2018)

Natural Disasters	Dates (2018)	Area	Economic Loss
Earthquake	9/9	Hokkaido	\$1.25+ billion
Typhoon 21 (Jebi)	8/28 - 9/5	Kinki	\$13+ billion
Typhoon 20 (Cimaron)	8/18 - 8/24	Kinki, Shikoku	\$100+ million
Typhoon 12 (Jongdari)	7/25 - 8/3	Kinki, Kanto	\$715+ million* (China included)
Torrential Rains	6/28 - 7/9	Kinki, Chugoku	\$10+ billion
Earthquake	6/18	Kansai	\$3.25+ billion

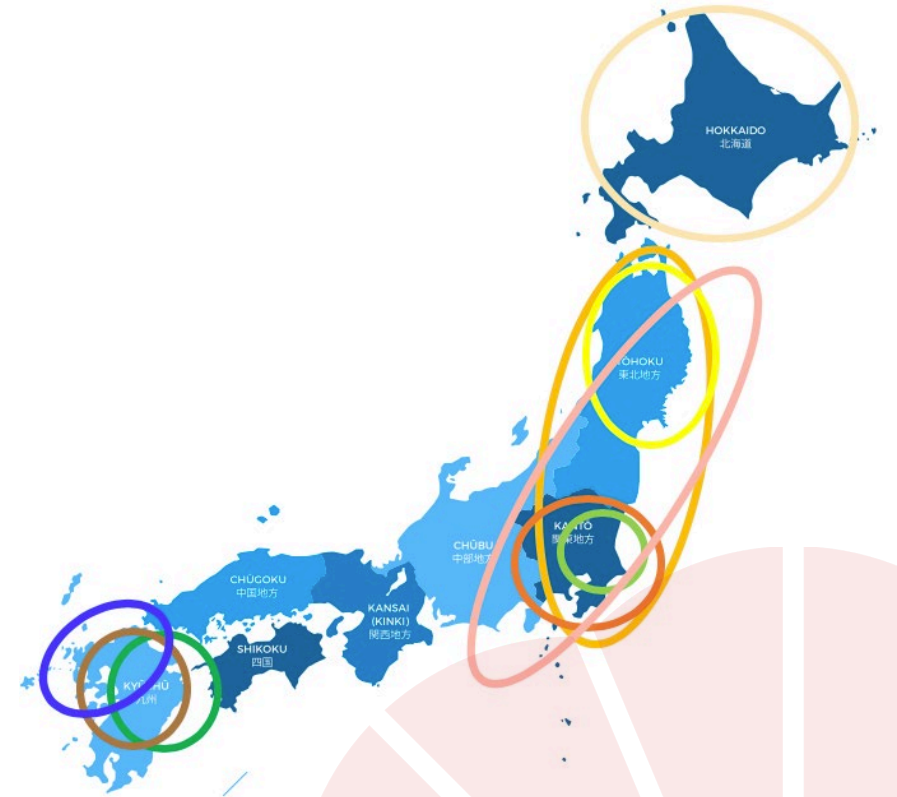


Total major natural disasters: 6
 Total economic loss: \$28.3 billion

Market conditions

Japan natural disasters (2019)

Natural Disasters	Dates (2019)	Area
Typhoon 19 (Hagibis)	10/11-13	Kanto, Koushinetsu, Tohoku
Typhoon 15 (Faxai)	9/5-9	Chiba, Kanto
Torrential Rains	8/26-28	Saga, Fukuoka, Kyushu
Earthquake	8/4	Fukushima, Tohoku
Earthquake	6/18	Yamagata, Tohoku
Earthquake	5/25	Chiba, Kanto
Earthquake	5/10	Miyazaki, Kyushu
Earthquake	2/21	Hokkaido
Earthquake	1/3	Kumamoto



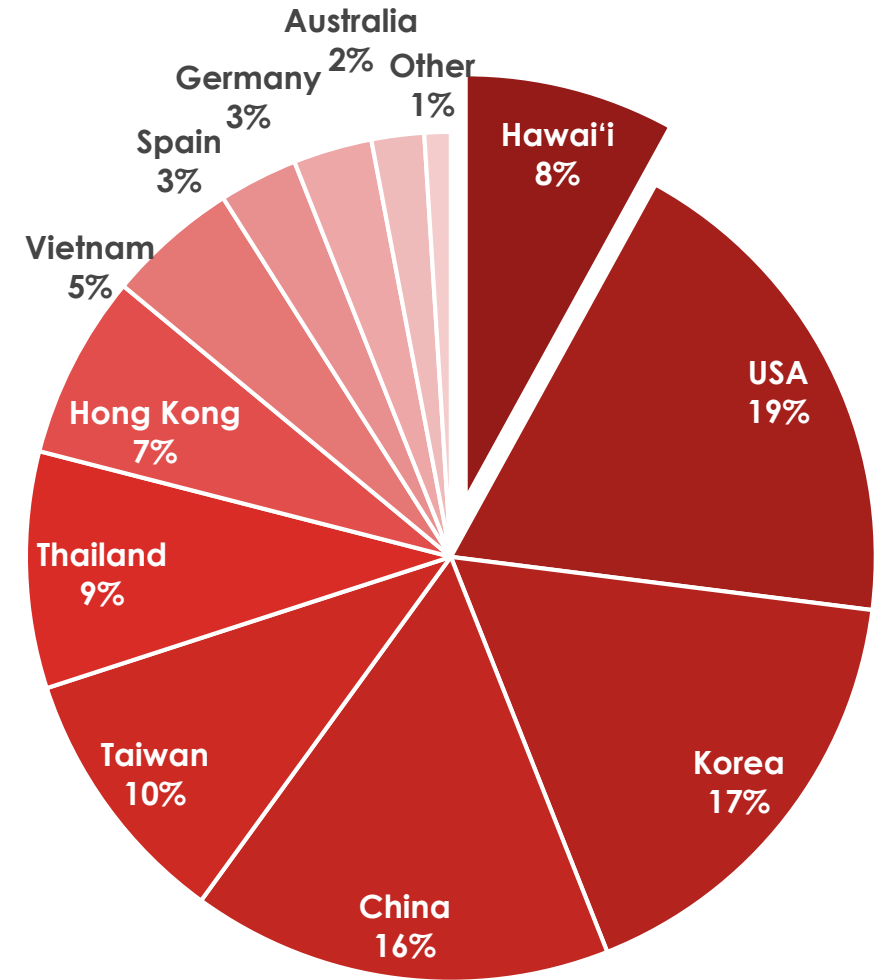
Total major natural disasters: 9
Total economic loss: TBD

Market conditions

Key trends

3. Japanese Outbound Market

- **11.2 million** total Japanese outbound travelers (incl. business trips) as of August 2019 (+8.3%)
- Hawai'i holds an 8% Share



Market conditions

Key trends

4. 2020 Tokyo Olympics

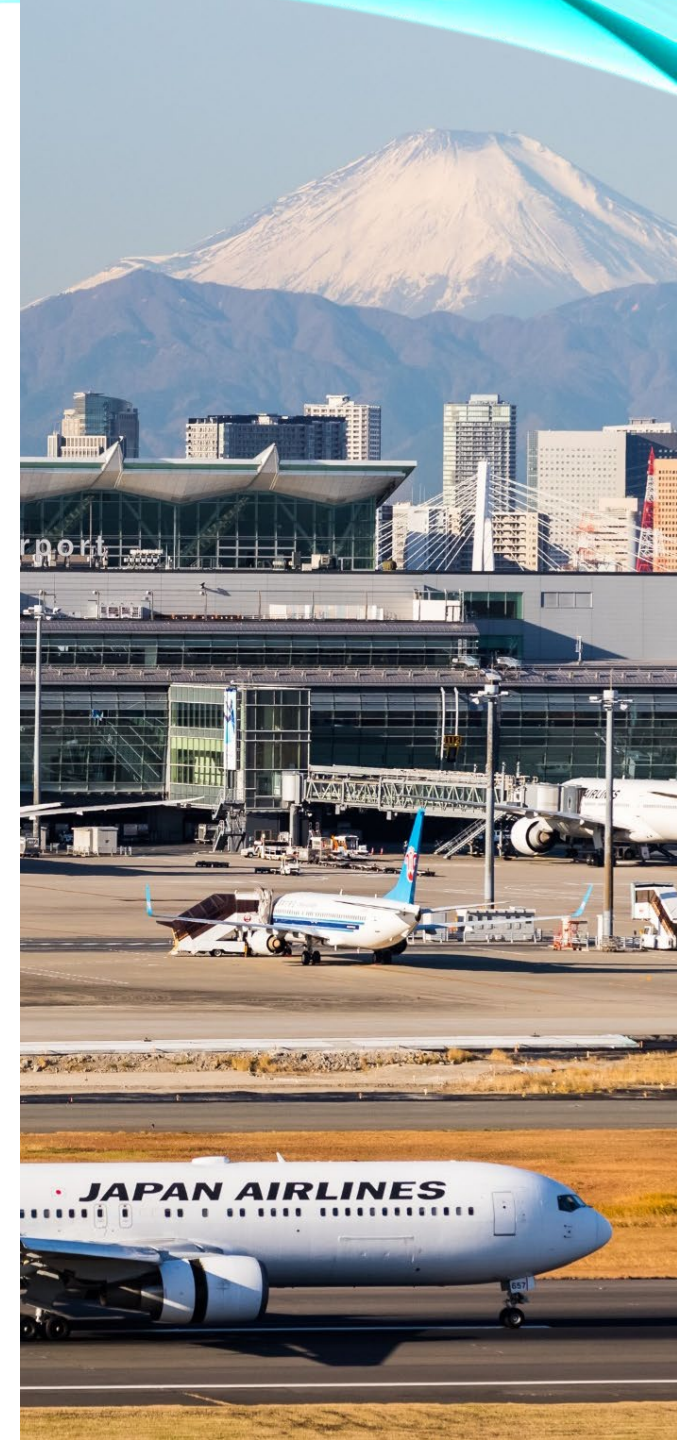
- Temporary boost to Japan's economy (increase in personal consumption and inbound travel demand)



Market conditions

Air seat synopsis

1. **16 new international slots** at Haneda Airport
3-5 slots anticipated for Hawai'i
 - New product development
 - New opportunities for first-timers from regional cities



Market conditions

Air seat synopsis

2. Rise of FIT travelers from Tokyo
 - Narita and Haneda comprise of 70% of market
3. Airline partnerships spur competition
4. Japan airlift to Hawai'i forecasted at 2.17 million seats in 2020 (+10%)






TRAVEL TRENDS

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Travel trends

Media preferences: Digital, digital, digital!

- Rise of environmental stewardship messaging
- Departure from single channel to multi-level platform marketing
- User Generated Content (UGC), influencer and micro-influencer marketing



Travel trends

General channel distribution

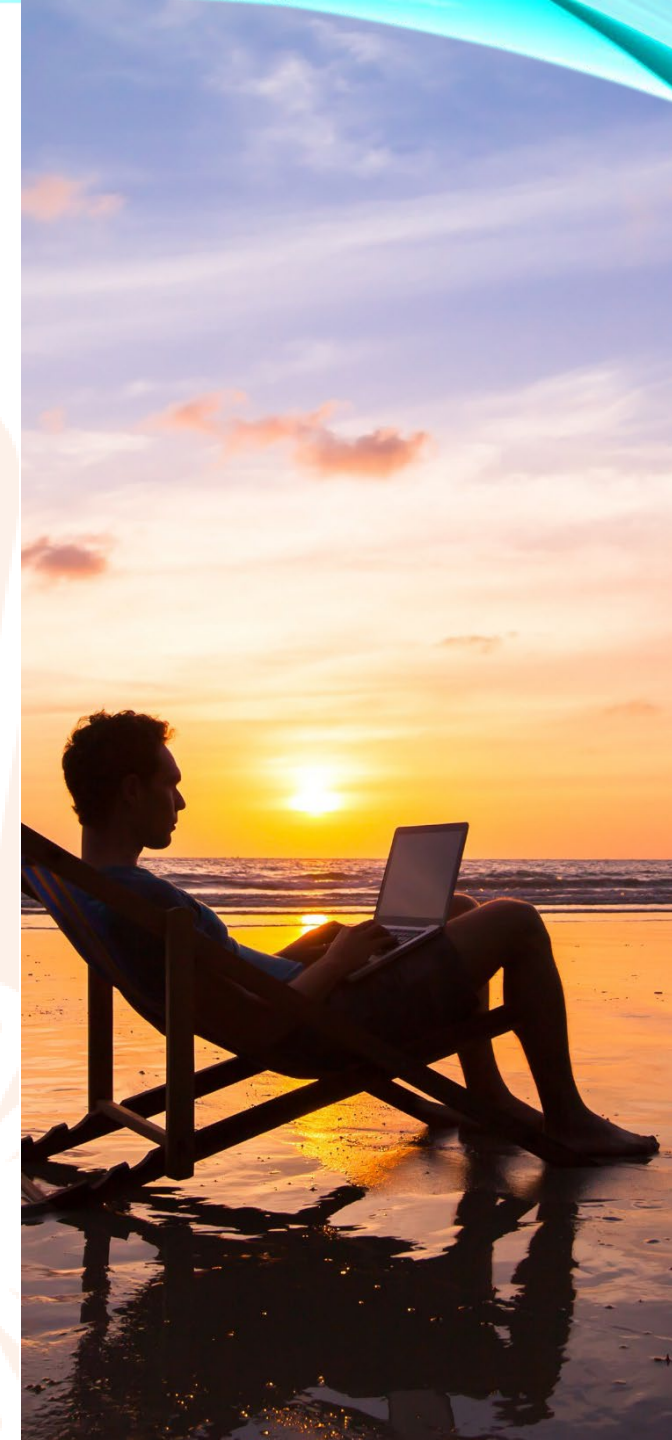
How do consumers shop for destination inspiration?

- Word of mouth, digital, various media
- Rise of conscious consumers - locavores, glamping, societal impact concerns
- Experienced-based consumption
- Workation - travel combining work and vacation
- Sustainability/health tourism/wellness

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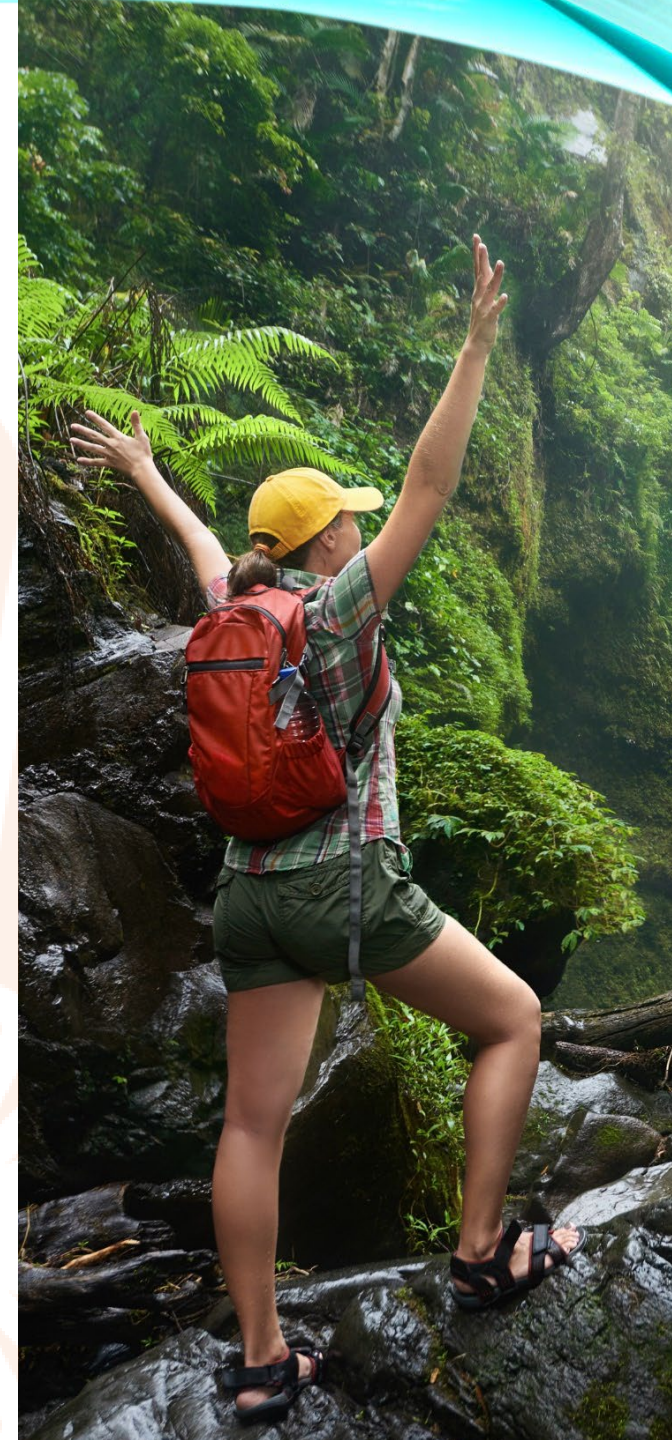
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Travel trends

General travel trends

- Rising world tourism population
 - Japan's steady outbound travel growth
- Rebound of competing destinations
 - Europe, Thailand, Vietnam, Guam
- Growing ecotourism initiatives
- Japan labor reform initiatives



TARGET AUDIENCES

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Target audiences

Trip persona targets

- Household Income \$100,000+
- Households/families with multiple generations
- Consumers in their 30s and 40s
- Single households targeting health/wellness, nature and workations
- Couples with and without children
- Millennials

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JTB, HIS, JAL, ANA, JCB, CPB, Japan sub-committee



Target audiences

Trip persona targets



High value
travelers



Romantic
couples



Experience
seekers -
millennials



Multi-generation

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Target audiences

Key geographic target areas

MAJOR REGIONS

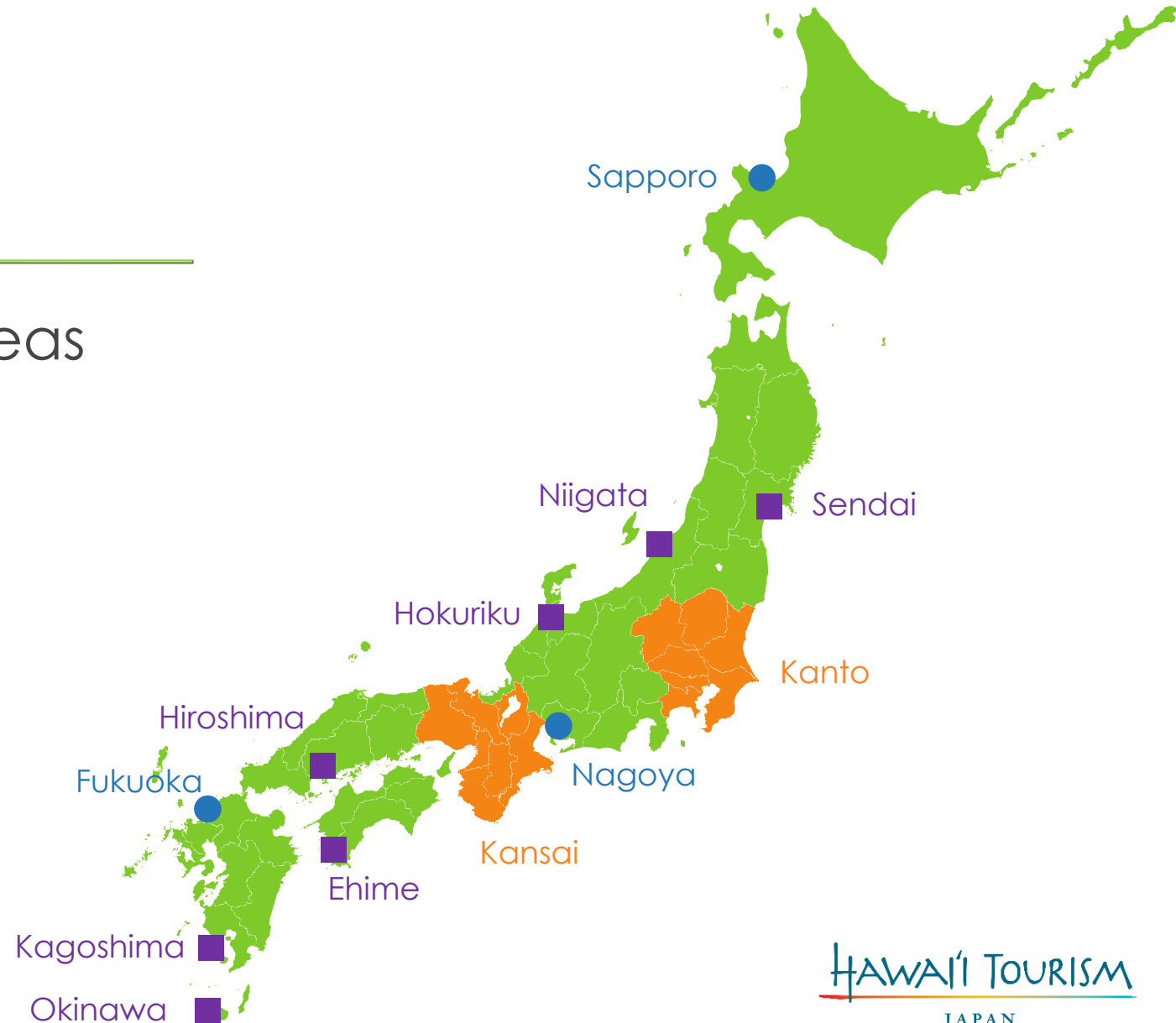
Kanto and Kansai

CITIES WITH DIRECT FLIGHT SERVICE

Nagoya, Sapporo and Fukuoka

CITIES WITH STRONG FEEDER FLIGHT ACCESS

Sendai, Niigata, Hokuriku, Hiroshima, Ehime, Kagoshima and Okinawa






CONSUMER STRATEGY

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Consumer strategy

General approach

- **Target marketing** – speak to defined audiences to attract and convert high-value travelers
- **Amplify content** - educate visitors on Hawai'i's natural resources and authentic Hawaiian culture while driving engagement



Consumer strategy

General approach

- **Industry and nonprofit partnerships** - develop community initiatives that enhance residents' and visitors' experiences
- **Signature events** – promote positive resident and visitor interaction
- **4 pillars marketing campaigns** – align all initiatives with brand marketing, Hawaiian culture, natural resources and community



Consumer strategy

Core brand messaging

- Hawai'i through lens of the past
 - Hawai'i is not about the beach, Diamond Head, shaved ice and loco moco



Consumer strategy

Core brand messaging

- Hawai'i today
 - Enlighten visitors about the aloha spirit through experiences and education
 - Inspire a deeper appreciation of Hawai'i's natural beauty, local community, historic significance and cultural depth



Consumer strategy

Core brand messaging

- Capitalize on the rich historical and cultural alignment between Hawai'i and Japan
- Tailor messaging to appeal to specific interests of target audiences

(High value traveler, romance, millennial, first-timer and further differentiate by island)



Consumer strategy

Advertising, PR, media FAMS, promotions

- Select platforms that align with target audiences (digital, OOH, social media)
- Promote collaborative content/2-way UGC campaigns
- Target marketing efforts specific to each island
- Differentiate repeat and first-timer strategies
- Position surfing as Hawai'i's state sport to capitalize on 2020 Tokyo Olympics introduction



Consumer strategy

Campaign targets

1. Affluent market
 - Mileage club and credit card members
 - Product development with retail outlets
2. Romance market
3. Regional city first-timer acquisition
4. Millennial market ambassador program



ハワイ州観光局 & TABIPPO 公認
Ambassador · HAWAII
-アンバサダーハワイ-

「ハワイ」はこれからの旅行・観光業界の未来を作っていく旅人を中長期プログラムです。世界中の旅人から愛される土地「ハワイ」をメインテーマとコミュニティを創ります。あなたも日本の次世代を創り上げる人材にな



Consumer strategy

Creative assets

- Build upon HVCB's Share Aloha and Hawai'i Rooted campaigns
- Expand library assets to include vertical videos, VR, short movies





TRADE STRATEGY

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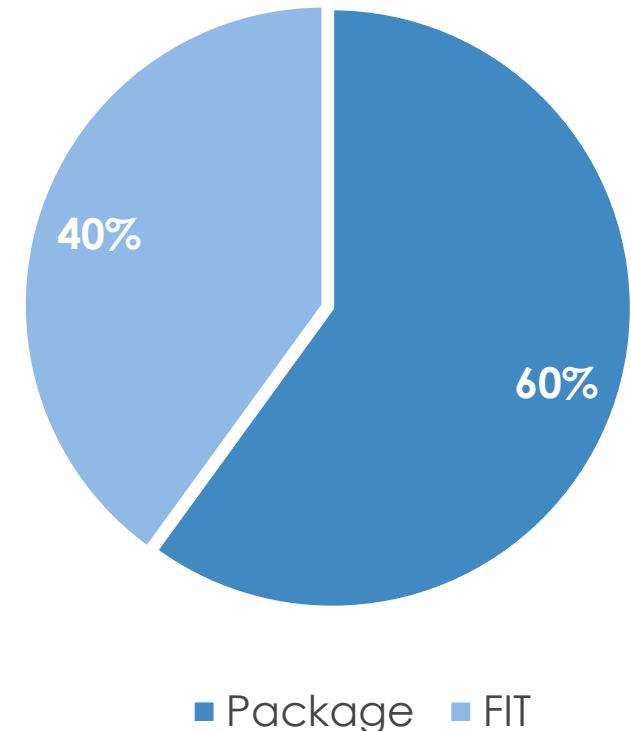


Trade strategy

Travel trade initiatives

- Top airlines, wholesalers, OTAs and retail agents – sales/promotions with highest ROI
- Educational training programs using enhanced technology (webinar, VR)
- Augment FAM tours by collaborating with airlines, partners and stakeholders
- Customize promotions for trade partners that align with goals/objectives

% of total Japanese travel to Hawai'i



Trade strategy



- HTJ's hallmark educational platform promoting Hawai'i and its history, culture and community
- Over 18.5k Hawai'i specialist travel agents in 210 branches
- Wholesalers' new hire training programs
- Charitable contributions to local NPOs





MCI

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MCI

MCI strategy

- Position Hawai'i as the closest U.S. destination with consistent airlift and abundant accommodation options
- Develop new initiatives targeting specific MCI markets
- Leverage strong wholesaler/organizer relationships to generate quality leads



7. MCI

Target audience

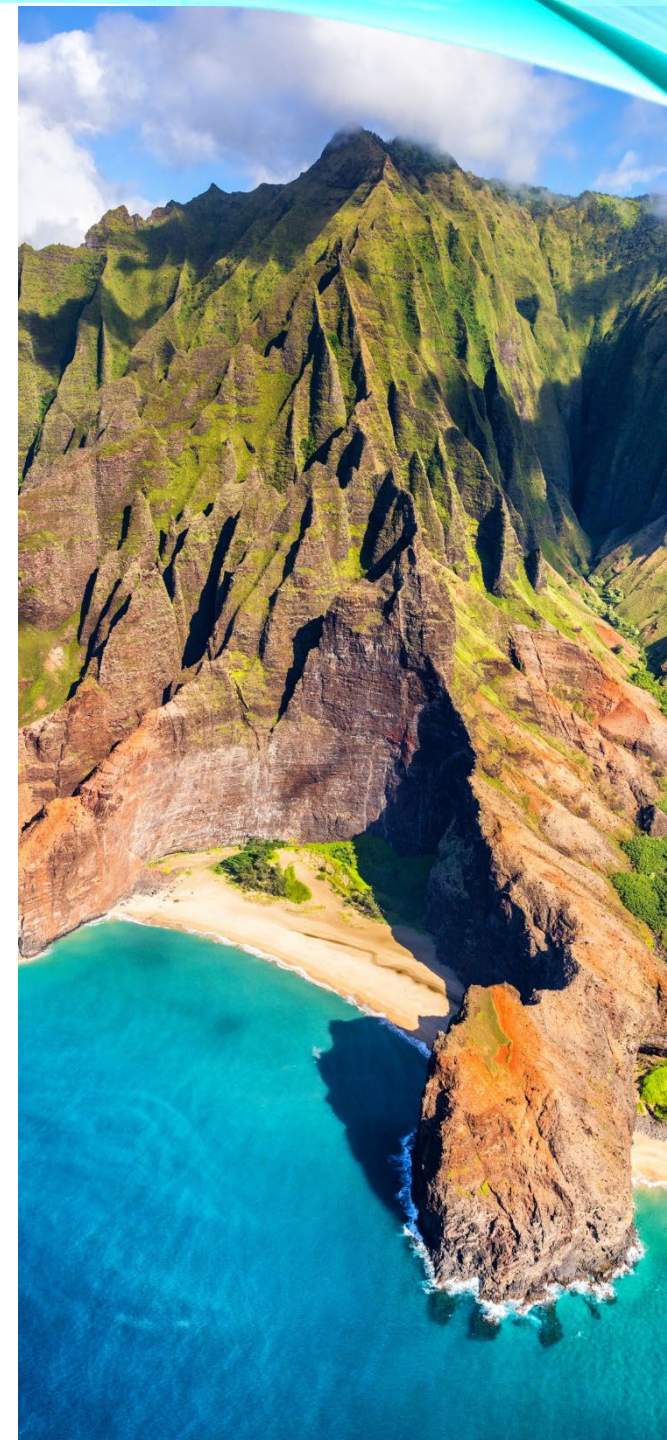
- Incentive
- Education
- Sports
- Entertainment
- Attendance building



7. MCI

Lead generation

- Smaller groups to neighbor islands
 - Incentive and education
- Regional city strategies
 - Cities that utilize feeder flights
 - MICE seminars and workshops
 - Airline joint promotions
- Responsible tourism focused organizations





RESPONSIBLE TOURISM

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Responsible tourism

Distribution of Hawai'i Rooted, Kuleana and travel tips

- Translate and repurpose HVCB and DLNR assets for distribution across Japan
- Showcase segments through digital marketing platforms
- Target environment/nature media in outreach efforts



Responsible tourism

Responsible tourism initiatives

- Create sustainable tourism package products with promotional support
- Facilitate activities that educate/promote Hawaiian culture (e.g., Hōkūle‘a documentary, ‘Ōlelo Hawai‘i study sessions)
- Work with local NPOs to enhance visitor experiences and build community engagement



Responsible tourism

Responsible tourism activities

- Sea Cleaners beach clean-up with HTO: Japan initiatives include Hawaiian Airlines at Chigasaki on 10/5 and Kamogawa (Kyoto) on 10/6
- Sea turtle display at JATA's Tourism Expo in Osaka using marine debris
- 'Ōlelo Hawai'i workshop



Responsible tourism

Responsible tourism activities

- Work with the DLNR, UH and NOAA to share informational materials with Japanese visitors
- Local 2030, Aloha + Challenge
 - Collaboration with Blue Planet Foundation and AKB48
- Educational seminar and movie blitz onboard the Hōkūle‘a in cities including Sapporo, Tokyo, Yokohama, Nagoya, Osaka and Hiroshima



Viewing Hawai'i Wildlife

Ocean recreation in Hawai'i can include encounters with marine wildlife. For their protection and your safety, view them responsibly!

Sea turtles, monk seals, dolphins and whales are wild animals and protected under state and federal laws.

Responsible Viewing	Viewing Distances
<p>View from a distance. Use binoculars or your camera's zoom for a close up.</p> <p>Do not disturb sea turtles or monk seals sleeping on the beach.</p> <p>Never touch, chase, or feed. Animals are wild, unpredictable and protected.</p> <p>Limit viewing time to a few minutes.</p> <p>Never swim with spinner dolphins — they rest and nurture their young during the day.</p> <p>View dolphins and whales from a boat or from shore.</p>	<p>Sea turtles View from at least 10 feet (3 meters) — on land and in water.</p> <p>Hawaiian monk seals Stay behind any signs or barriers.</p> <p>Stay back 50 feet (15 meters), if no barriers.</p> <p>Dolphins Stay back at least 50 yards (45 meters).</p> <p>Humpback whales Do not approach within 100 yards — federal law.</p>

Reporting
NOAA Statewide Hotline for Marine Animal Emergencies (sea turtles/seals/dolphins/whales): 1-888-256-9840
For illegal or suspicious activity: 1-800-853-1964 or (808) 643-DLNR (3567)
Email photos and video to: RespectWildlife@noaa.gov

NOAA FISHERIES National Marine Fisheries Service
Pacific Islands Regional Office

ハワイの野生海洋生物の保護について

ビーチ滞在時やマリンスポーツ中に、ウミガメ、ハワイアンモンクシール(アザラシ)、イルカ、クジラに遭遇することがあります。

ウミガメ、ハワイアンモンクシール(アザラシ)、イルカ、クジラ等の野生海洋生物は、ハワイ州法とアメリカ連邦法によって保護されています。違反した場合は罰金が科せられます。

野生海洋生物はとてもデリケートなもので、ビーチ滞在時やマリンスポーツ中に遭遇した場合はご自身の安全のためにもマナーを守って観察すること

推奨距離以内に近づかないこと

推奨距離			
ウミガメ	ハワイアンモンクシール	イルカ	ザトウクジラ
3メートル (10フィート)以上	15メートル (50フィート)以上	45メートル (30ヤード)以上	90メートル (300ヤード)以上

マナー

- イルカと一緒に泳がないこと
- イルカは目には当たらないので、観察を控えないこと
- ビーチで待っているウミガメやハワイアンモンクシールの撮影を控えないこと
- 抱いたり、追いかけたり、入さを舐めたりしないこと
- 長時間、観察しないこと
- カメラやスマホ等の撮影機器も近づけず一定の距離から観察すること
- イルカやクジラを見る時はボートや岸など離れた場所から観察すること

NOAA: アメリカ海洋大気庁
Translated by UN Miyazaki POWO





Putting it all together...

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Brand Marketing

In 2020, HTJ will drive its core brand messaging to target audiences and **attract high-value visitors** in the affluent, romance, multi-generation and millennial markets while capitalizing on the Olympic Games in Tokyo.

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Hawaiian Culture

Aloha Program will be used as the vehicle for cultural practitioners to **inspire Hawai'i experiences** and educational opportunities that **perpetuate Native Hawaiian culture** while sharing Hawai'i's rich history.

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Natural Resources

In addition to new package development, responsible tourism will be reinforced by **educating visitors** to respect Hawai'i's fragile environment pre-arrival and while on island through joint initiatives with DLNR, UH and NOAA.

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Community

Focus will be made on **building community engagement** by collaborating with local NPOs and promoting events that enhance experiences for visitors and residents.

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HTJ's implementation framework for 2020 will be guided by the 4 pillars that represent the essential investment towards Hawai'i's visitor industry future and long-term success.



Brand Marketing



Hawaiian Culture



Natural Resources



Community

The background features vibrant, flowing, wavy lines in shades of orange, red, yellow, green, and blue, creating a dynamic and tropical feel.

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MAHALO

有難うございました！