

The slide features a white background with abstract, flowing, multi-colored ribbons in shades of red, orange, yellow, green, and blue. The text is centered and reads:

HAWAII TOURISM™
JAPAN
2021 MARKET UPDATE

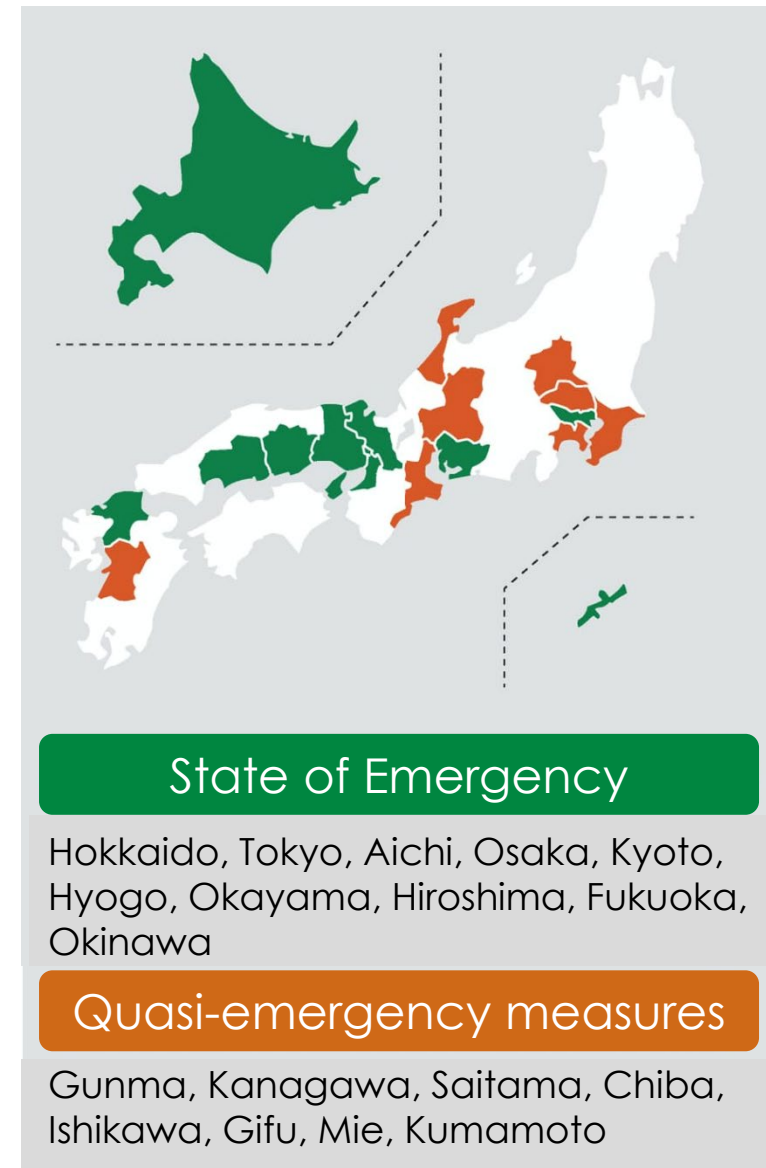
HTA BOARD MEETING
5.27.2021

Eric Takahata
Managing Director

MARKET CONDITIONS

MARKET CONDITIONS

- Japan expands and extends emergency measures as cases rise across the nation (as of 5/24)
- Estimation of economic loss : ¥1 trillion (\$9.2 billion)
- Japan to cut number of visiting Tokyo Games officials to less than 90,000



MARKET CONDITIONS

(as of 5/24)

Population

United States	Japan	Hawai'i	Tokyo
330.14 million	125.9 million	1.41 million	14 million

Cases of COVID-19 in the US, Hawai'i and Japan

	U.S.	Hawai'i	Japan
Total Cases	32,947,548	35,901	718,864
Recovered	NA	NA	639,887
Deaths	587,342	496	12,312

Comparison of cases in Hawai'i and Japan per capita (100,000)

United States	Japan	Hawai'i	Tokyo
9,908	572	2,535	1,126

***CDC Level 4 Japan**

MARKET CONDITIONS

~Japan's COVID-19 vaccination~

Japan Population: 126.5 million (Japan has reserved doses to cover all population)

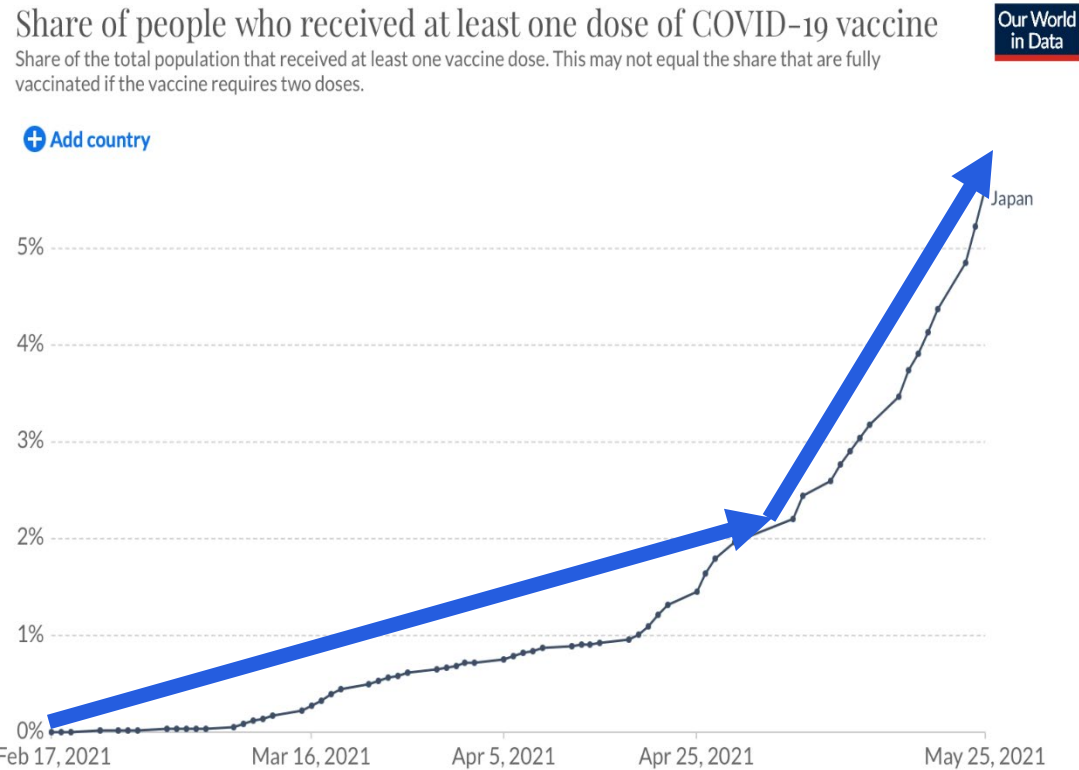
Vaccine Schedule

- ❖ **2/17:** Medical Workers (est. 4 million)
- ❖ **4/12:** Senior* (65+ years old, est. 36 million)
 - ❖ By end of June, completion of 2nd dose for senior citizens
- ❖ **Next:**
 - ❖ Person with underlying conditions (est 10.3 million)
 - ❖ Care-taker for senior facility (200K), 60-64 years old
- ❖ By September 2021, the government has secured vaccines for all citizens (16+ years old)



MARKET CONDITIONS

~Japan's COVID-19 vaccination~



U.S.	Hawai'i	Japan
49.1%	57%	5.6%

- Japan government targets over 1 million dose per day
- **5.6%** of Japan's population (at least one dose)
As of 5/25, over 7.5 million doses administered
- Target of vaccinating **1 million** people a day (Japan Government)
- **Approved** Moderna and AstraZeneca vaccines
- Additional doses
 - Secured **50 million** doses from Pfizer by the end of September
 - Discussed Moderna (**50 million**) & Novavax (**150 million**) to receive
 - Additional vaccination personnel measures

MARKET CONDITIONS

Travel conditions continued...



All travelers, including returning Japanese nationals are required:



To submit a proof of a negative PCR Test for all entry into Japan



To quarantine for 14 days

MARKET CONDITIONS ~AIRLIFTS (MAY TO JULY)~



2021 May				
Op Airline Name	Flight #	Origin Code	Total Flights	Seats
All Nippon Airway	NH 186	HND	9	2,214
Hawaiian Airlines	HA 822	NRT	13	3,614
Hawaiian Airlines	HA 450	KIX	4	1,112
Japan Airlines	JL 74	HND	8	1,488
			34	8,428

2021 June				
Op Airline Name	Flight #	Origin Code	Total Flights	Seats
All Nippon Airway	NH 186	HND	8	1,968
Hawaiian Airlines	HA 822	NRT	13	3,614
Hawaiian Airlines	HA 450	KIX	4	1,112
Japan Airlines	JL 74	HND	9	1,674
			34	8,368

2021 July				
Op Airline Code	Flight #	Origin Code	Total Flights	Seats
All Nippon Airway	NH 186	HND	9	2,214
Hawaiian Airlines	HA 822	NRT	14	3,892
Hawaiian Airlines	HA 450	KIX	4	1,112
Japan Airlines	JL 74	HND	8	1,488
ZIPAIR Tokyo	ZG2	NRT	2	580
Total			37	9,286

Total Flights # by airport

- ❖ Haneda-17
- ❖ Narita-13
- ❖ Kansai-4

7 to 8 flights per week

Total Flights # by airport

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- ❖ Narita-13
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7 to 8 flights per week

Total Flights # by airport

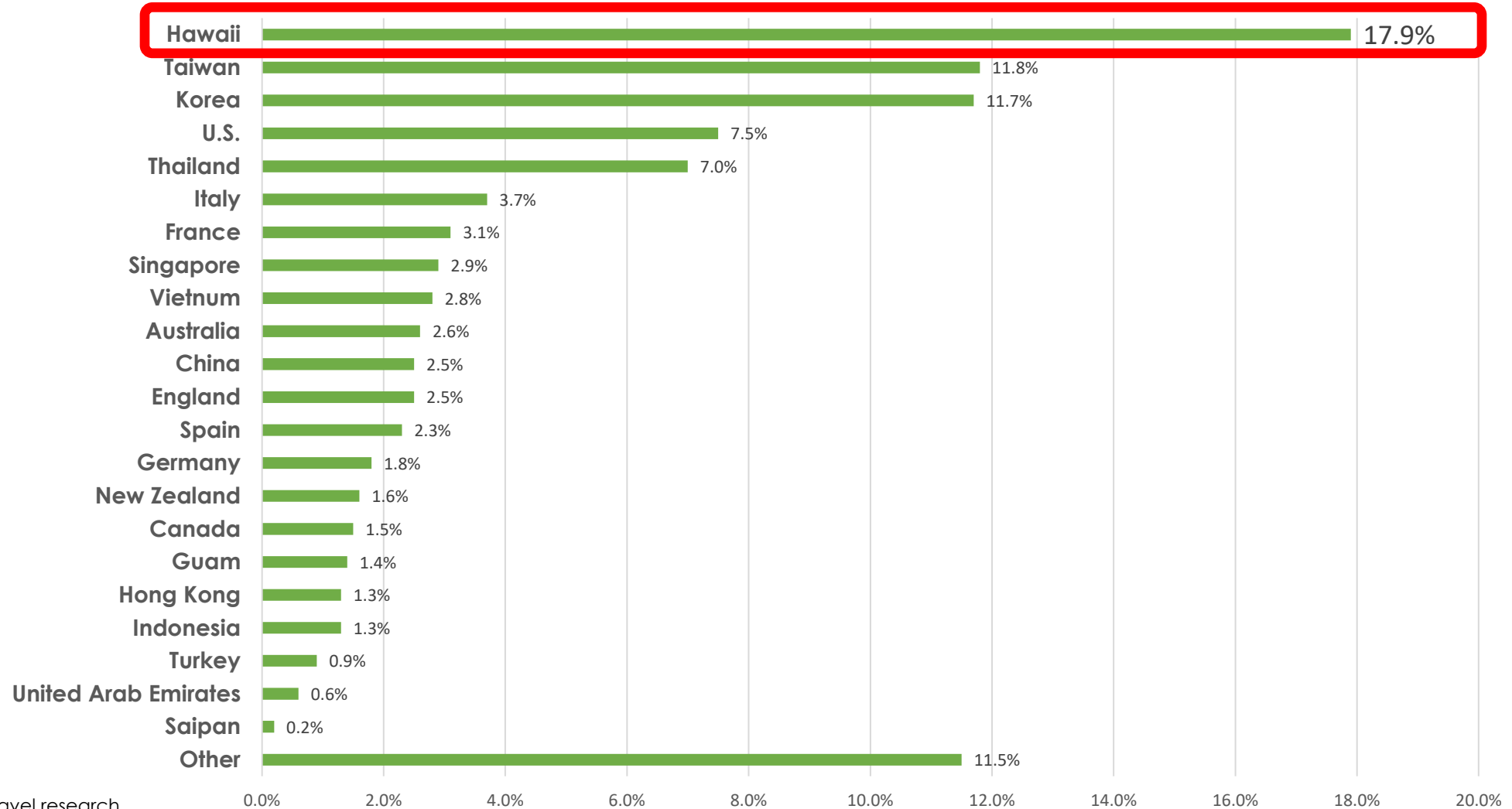
- ❖ Haneda- 17
- ❖ Narita-16
- ❖ Kansai-4

7 to 8 flights per week

MARKET CONDITIONS ~Consumer sentiment~

Q: Which destination you select for next trip?

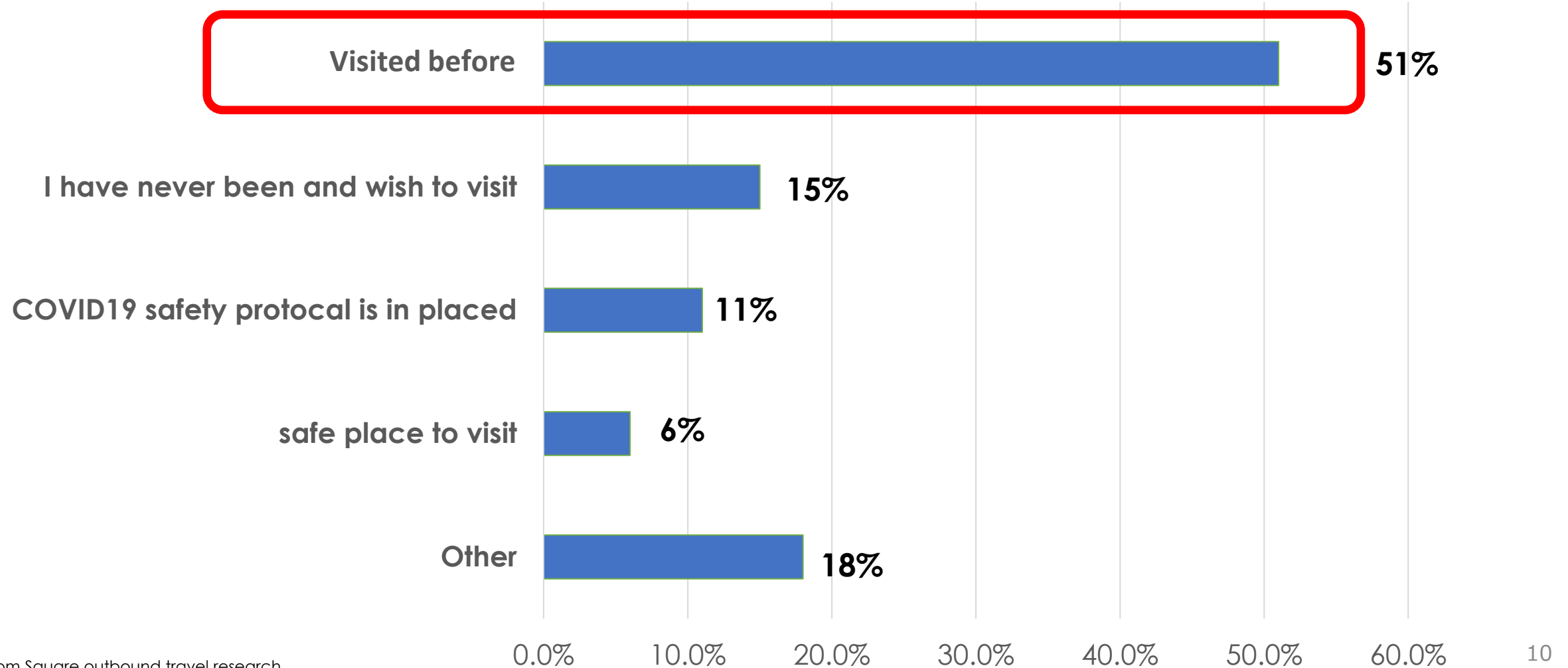
(n=1,981)



MARKET CONDITIONS ~Consumer sentiment~

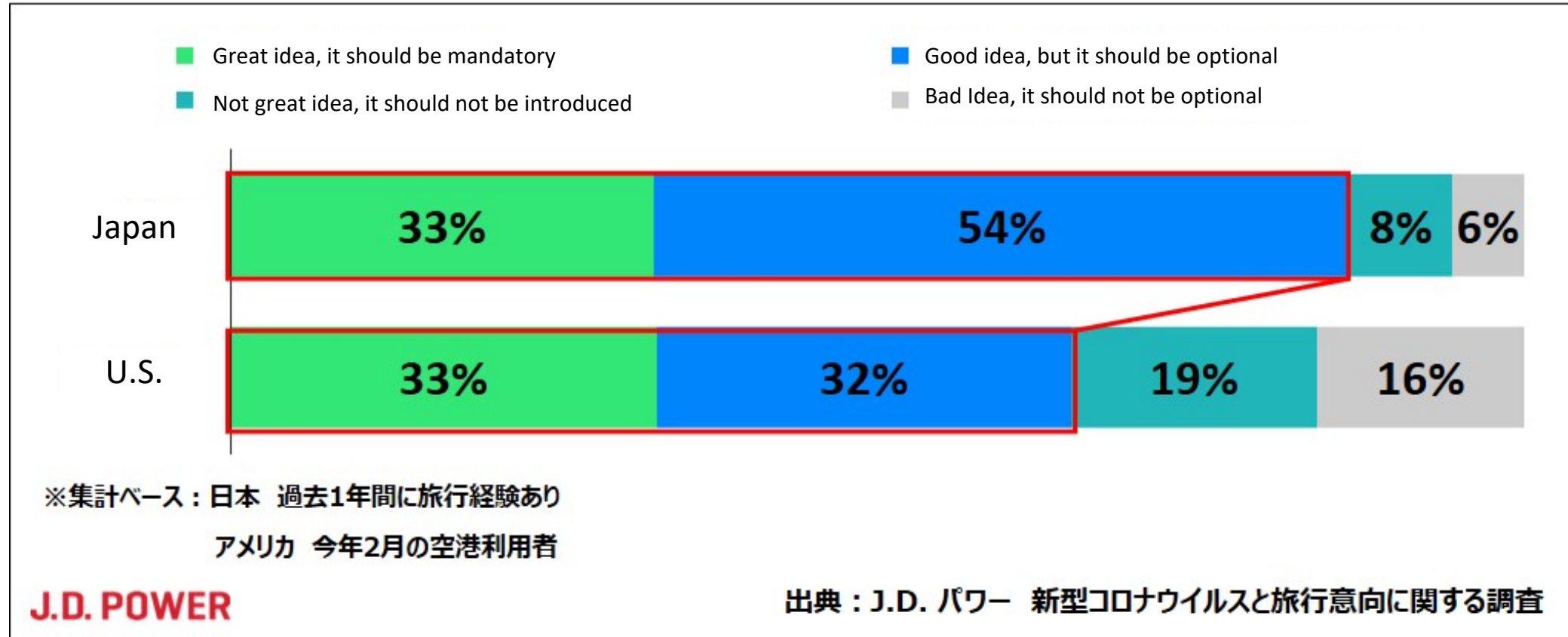
Q: Why did you select the destination?

(n=1,981)



MARKET CONDITIONS

Q: What is your opinion of a “digital vaccine passport?” (n=2,000)



Travelers like the “vaccine passport” idea

Japan: 87% vs US: 65 %

MARKET CONDITIONS

~COMPETITIVE DESTINATION~

Asia Competitive Destination

- **Travel Recovery Campaign:** Offering 20,000 complementary round-trip air ticket promotion

Korea

- **Hosted FAM tour :** Heavily approaching Japan Travel industry and Government to host multiple FAM tour to Korea

MARKET CONDITIONS

~COMPETITIVE DESTINATION~

Taiwan

- **Taiwan Festival 2021 in Tokyo:** 6/17 to 6/20
- **Tokyo Tower Taiwan Festival 2021 Summer:** Taiwan gourmet theme event from 5/22 to 7/11
- **Global Streets Walk with JTB Twitter campaign collaboration**

Australia

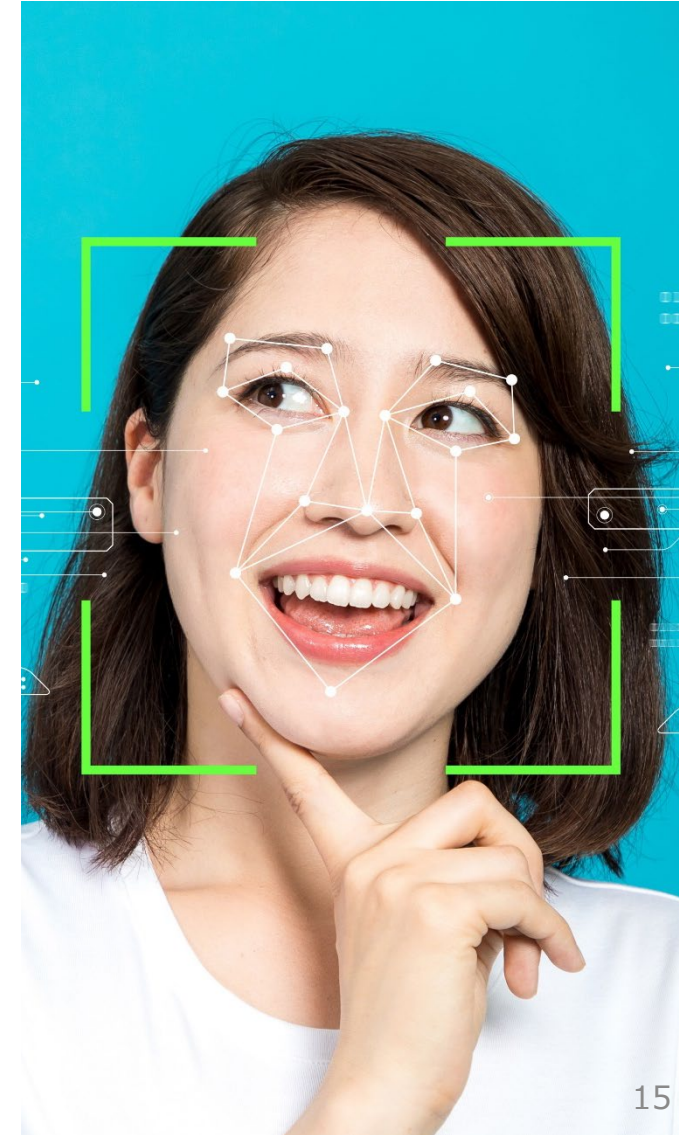
- **ELLE Gourmet Food & Travel video promotion:** Australia Tourism collaborates with "ELLE magazine" creating the 3 gourmet video series and will distribute from 6/4
- **Theme Charter Outbound travel:** Australia theme charter flights operated by JAL departing Narita on 6/12

TARGET AUDIENCE

TARGET AUDIENCE

- Hawai'i repeaters
- Visit outbound travel once a year at least
- Willing to invest on self-improvement & wellbeing
- Globally conscious contributors
- Higher income over US \$100,000

(Spending potential, desirable attributes, segment size)



Target audience personas



Pono Travelers

MAIN ATTRIBUTE

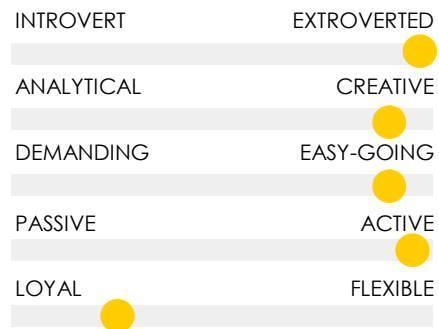
AGE: 20-40s

RESIDENCE: Japan

PROFESSION: Various

RELATIONSHIP: Various

PERSONALITY



Multi-Generation Families

MAIN ATTRIBUTE

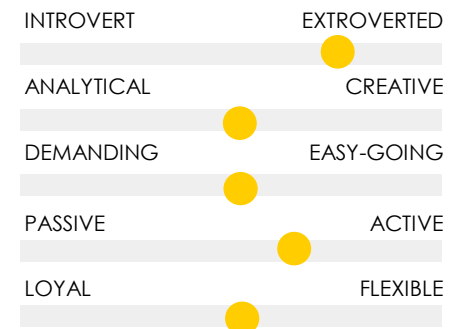
AGE: 30-50s

RESIDENCE: Japan

PROFESSION: Various

RELATIONSHIP: Married and have children

PERSONALITY



New-norm workers

MAIN ATTRIBUTE

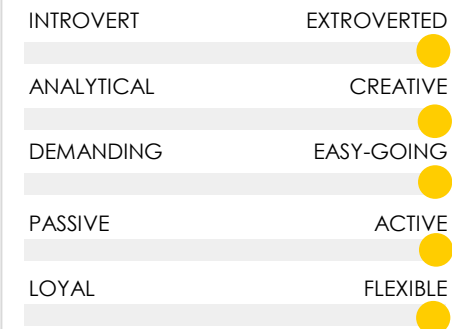
AGE: 20-40s

RESIDENCE: Japan

PROFESSION: Various but mostly able to work remotely

RELATIONSHIP: Various

PERSONALITY



Couples/Romance

MAIN ATTRIBUTE

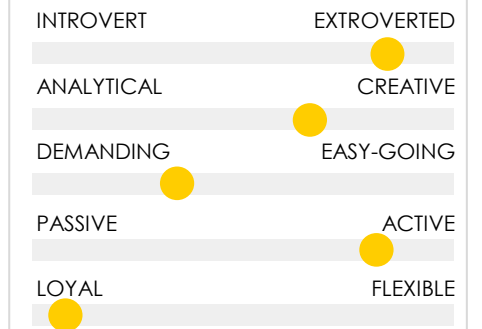
AGE: 20-30s, 40-60s

RESIDENCE: Japan

PROFESSION: Various

RELATIONSHIP: Couple

PERSONALITY



PRIMARY TARGET REGIONS



Major market region

- Kanto area
(Tokyo, Kanagawa, Saitama, Chiba)
- Kansai area
(Osaka, Hyogo, Kyoto, Nara)

Secondary market region

- Aichi, Fukuoka, Sapporo

CONSUMER STRATEGY



A person is pouring water from a brown ceramic pitcher with blue patterns into their hands. The scene is set in a grassy field with a small pink flower in the foreground. The text '— MĀLAMA —' is written in white serif font above 'HAWAII' which is also in white serif font. A white horizontal line is positioned below the text.

— MĀLAMA —
HAWAII

地球にやさしい旅を

CONSUMER STRATEGY

Jan – Dec 2021 approach

- Focus on public relation and SNS contents distribution for Jan – Dec of 2021
 - Hawai'i New Normal & Safety Protocol
 - New destination experience introduction & stories
 - Responsible Tourism (Mālama Hawai'i) direction
(i.e. SDGs = Aloha+ Challenge)
- HTJ CRM (database) campaign to target Hawai'i fan & Repeaters
- Aloha Program Hawai'i specialists enhancement program

(Hawai'i culture program, Responsible Tourism – Mālama Hawai'i and Support Hawai'i Program)

CONSUMER STRATEGY

Jul – Dec 2021 approach

- Prepare for travel resuming from Japan
 - Implement the contents of DMAP through newsletter and media website
 - Collaborate with Hawai'i media which has Hawai'i repeaters as readers
 - Collaborate with media partners and stakeholders to send out unified messages
- Continue to approach media relating to edu-tourism and media focusing on sustainability

CONSUMER STRATEGY

Jul – Dec 2021 approach

- Collaborative initiatives with airline/credit card company to target high value market from their membership data
- Branding campaigns based on Responsible Tourism (Mālama Hawai'i)
- In start-up: Hilton Grand Vacation, JCB Credit Cards, E Noa Tours Mālama initiatives
- Starting: TRUE data initiative collaboration with DBEDT
- Media initiatives to reach target audiences
- Digital marketing and advertising initiatives
- DISCONTINUED: Wear Aloha, Save Aloha promotion

CONSUMER STRATEGY

HTJ INITIATIVES ~MĀLAMA HAWAI‘I~



TRADE STRATEGY

(AFFECT Q4 BOOKINGS)



TRADE STRATEGY

~TRAVEL INDUSTRY OUTLOOK~



- Major wholesaler package products will be available from July 1 arrival to Hawai'i and will focus sales promotion for Summer onward
- JATA's consideration of travel combination concept of Managed Travel concept with vaccine tour as outbound travel recovery
- Airlines increase air seats for summer, especially 2nd week of August
- Working with Japanese carriers to air Kuleana/Mālama content inflight

TRADE STRATEGY

~AIRLINES PREPARATIONS~



JAPAN AIRLINES

Airlines Trialing IATA Travel Pass



- ANA started IATA Travel Pass experiment between 5/24 to 6/6 on Hawai'i and New York routes, Haneda departure.
- Qualification: over 18 years old with IC chip passport and smart phone holders.
- JAL has experimented the 3 COVID vaccine proof, CommonPass, VeriFLY and IATA Travel Pass starting 4/2.
- These experiments available for the flights from Haneda and Narita.

TRADE STRATEGY ~WHOLESALE PREPARATIONS~

- Major wholesalers have placed the package tours departing from **7/1, 2021**
- Honolulu Marathon 2021**

ルックJTBのごたびサービス

- 出発前から安心！RAKUなびリゾートハワイ
- 新しい旅JTBスマートハワイ

ハワイのおすすめツアー

JTBスマートハワイPlus ホノルル5日間 07/01~10/31	JTBスマートハワイPlus ホノルル5日間 07/01~10/31	JTBスマートハワイ ホノルル5日間 07/01~10/31
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2020年11月より 日本からの渡航者 受け入れ再開!
Hawaii

百休み Summer vacation 旅行特集 2021

夏休み 海外旅行大特集 2021年

2021-2022 年末年始もチェック

	7月16日(金)	7月17日(土)	7月18日(日)	7月19日(月)	7月20日(火)	7月21日(水)
ハワイ	○	○	○	○	○	○
グアム	○	○	○	○	○	○

ANAトラベラーズで行く! Hawaii

2021/7/1 ~ 2021/12/24

ホノルル空港への送迎は、往復専用車をご用意します。

「新型コロナウイルス感染症の対策について」

ANAトラベラーズは、お客様に安心してご参加いただくため、皆様を不安を少しでも解消できるよう、新型コロナウイルス感染症への対策を実施しております。

＜航空券+ホテルのフリープラン＞ハワイ5日間＜スタンダードクラスホテル利用＞

旅行代金 170,800~207,800円

出発日 2021/7/1~2022/4/20

旅行日数 5日間

目的地: ハワイ(米国)/オアフ島・ホノルル

航空会社: ハワイアン航空、日本航空、大韓航空、ANA (エーエヌエー)、ユナイテッド航空

ホテル: 指定なし

食事: 朝食0回 昼食0回 夕食0回

TRADE STRATEGY



- Extensive online education (Mālama)
- Enhancement of travel trade website
- Recovery preparation
- Recovery product development support to include Mālama
- Immediate stakeholder implementation support
- Industry education (Industry FAM tours, Japan Summit, etc.)
- Collaborate with travel trade media to message Hawai'i's destination strategy (Mālama)

TRADE STRATEGY

~ONLINE HAWAI'I TOURISM FORUM~



2021年3月-5月の第3水曜日に開催
ハワイ・ツーリズム・フォーラム
 旅行業界、教育機関、旅行業界を目指す学生、メディアを対象にフォーラム参加者募集中

フォーラムに参加して
 コロナ禍にハワイの情報をキャッチ

2021年3月「新型コロナウイルスとハワイ州」、4月「SDGsとハワイ州」、5月「教育旅行とハワイ州」をテーマに「ハワイ・ツーリズム・フォーラム」を開催します。各テーマの専門家、ハワイ関連パートナーが登壇し、取り組み、事例を紹介します。今後の旅行商品開発やニューノーマルのハワイ旅行に備えませんか？

3/17(水) 9:00-12:00
 新型コロナウイルスとハワイ州
 ハワイ州の新型コロナウイルスにおける状況をはじめ安全・衛生対策、航空会社の取り組みなどを紹介

4/21(水) 9:00-12:00
 SDGsとハワイ州
 ハワイ州のSDGsとは？ハワイ州をはじめハワイ関連パートナー、NPOの取り組みを紹介

5/19(水) 9:00-12:00
 教育旅行とハワイ州
 学びの宝庫ハワイには、オンライン授業、バーチャル修学旅行の観光資源が満載。事例と共に紹介

お問い合わせ：
 ハワイ州観光局 セールsteam sales@htjapan.jp

HAWAII TOURISM JAPAN
 ハワイ州観光局

1st HTF: 3/17, COVID19 situations in Hawai'i (as of 5/18)

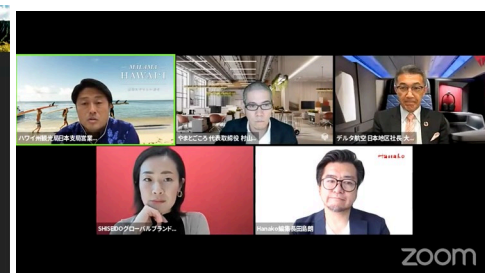
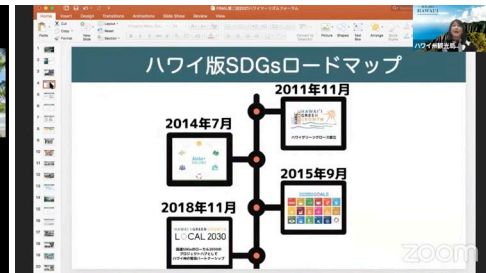
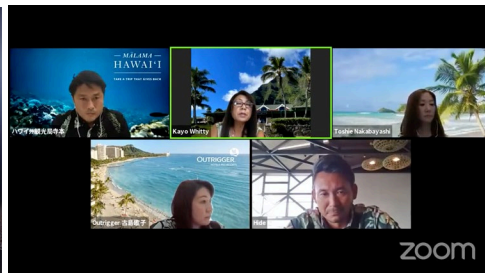
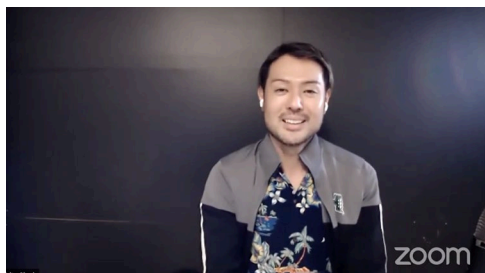
- Total 764 LIVE participants
- **2,279 views**
- 47 media exposure, 1,292,996,717 Impression, AVE\$182,478

2nd HTF: 4/21, SDGs x Hawai'i (as of 5/18)

- Total 782 LIVE participants
- **2,256 views**
- 52 media exposure, 1,541,354,423 PV, AVE \$196,158

3rd HTF: 5/18, SDGs x Hawai'i (as of 5/18)

- Total 672 LIVE participants
- **1,200 views**
- 36 media exposure, 15,293,491,309 PV, AVE \$139,500

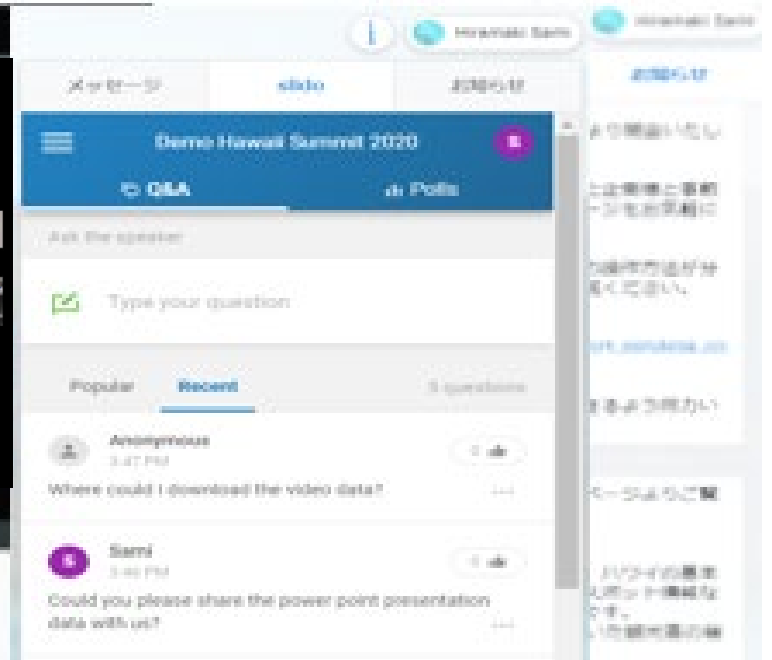


TRADE STRATEGY

~HAWAI'I JAPAN SUMMIT (SEPTEMBER 2021)~

Hawai'i Japan Summit program:

- Keynote speech
- Market Update
- Partner B2B session
- FAM tour



TRADE STRATEGY

~Hawai'i Expo virtual Event (Q4 2021)~



TIME SCHEDULE

10:00-10:46	セレクトショップ
11:00-11:46	アパレルショップ
12:00-12:45	フード＆ドリンクブース
13:00-13:45	アラモアナホテルブース
14:00-14:46	ハレクラニブース
15:00-15:45	ハイアットブース
16:00-16:45	マリノットブース

BOOTH CHANNEL

- HOTEL
- AIR
- ACTIVITY
- WEDDING
- TRAVEL
- CAR
- SEMINAR
- WORKSHOP
- HJT



Booth image



Stage Image

- Entertainment Stage
 - Partner's Booth
 - Seminar & Workshop area
 - E-commerce/Shops area
- And more

TRADE STRATEGY

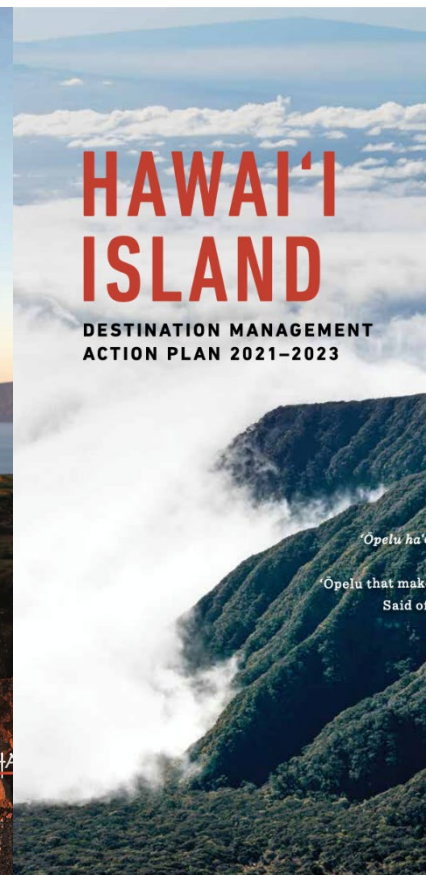
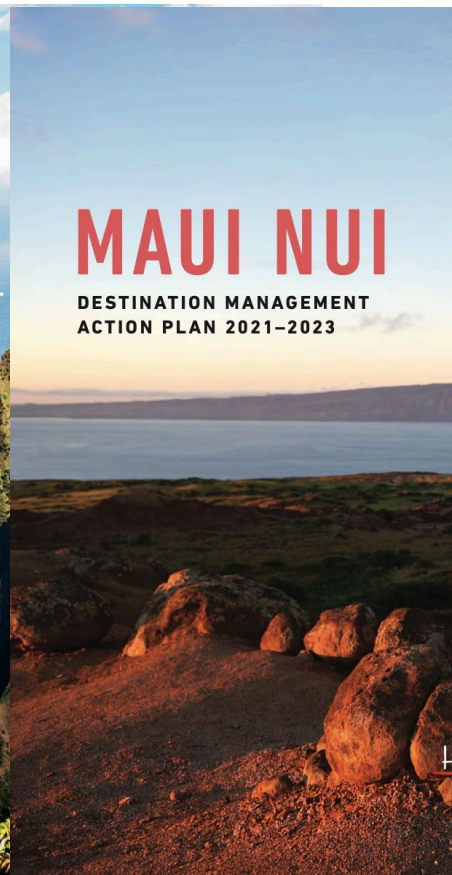
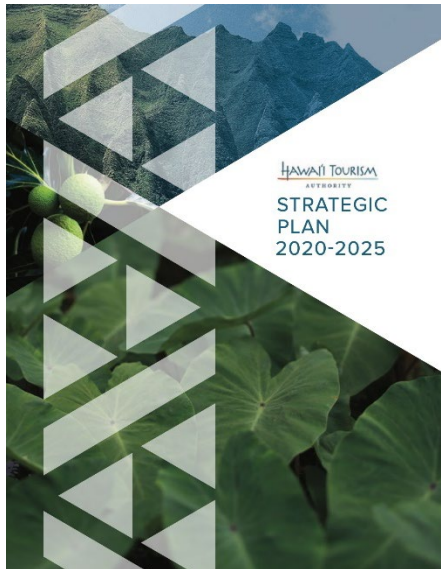
~MCI~

- Promote “Hawai‘i as learning destination” via Mālama
- Target 3 core segments – incentive, edu-tourism and entertainment
 - Incentive – MLM, construction, telecommunication, retail
 - Edu-tourism – small-scale, high-spending schools in 5 cities
 - Entertainment – HIS, JTB and KNT’s entertainment division
- Short-term, small group bookings
 - e.g. 50 – 100 pax , 100 - 200 room nights
 - 2022 onward
- Educate wholesalers MCI/Group via online and other methods

REGENERATIVE TOURISM / DMAP INITIATIVES

REGENERATIVE TOURISM/DMAP INITIATIVES

~DMAP 2021-2023~



Education to both travel trade & general consumers

REGENERATIVE TOURISM/DMAP INITIATIVES














- Public relation – messaging distribution
- Enhancement of Hawaiian Island contents on HTJ Platform “allhawaii.jp”
- Educational resource development (in Japanese)
- SNS diffusion

REGENERATIVE TOURISM/DMAP INITIATIVES ~COLLABORATION WITH LOCAL COMMUNITIES~

— MĀLAMA —
HAWAII‘I

20 NPOs information page posted (as of 5/19)

地球にやさしい旅を

 <p>アウワヒ・フォレスト・レストレーション・プロジェクト (Auwahi Forest Restoration Project)</p>	 <p>ホオクアアイナ (Ho'okua'aina)</p>	 <p>ハワイ・フォレスト・インスティテュート (Hawaii Forest Institute)</p>	 <p>ノースショア・コミュニティ・ランド・トラスト (North Shore Community Land Trust)</p>	 <p>ナショナル熱帯植物園 (National Tropical Botanical Garden)</p>	 <p>アハ・プナナ・レオ (Aha Pūnana Leo)</p>	 <p>イミロア天文学センター (Imiloa Astronomy Center of Hawaii)</p>	 <p>コーラル・リーフ・アライアンス (The Coral Reef Alliance)</p>	 <p>ブループラネット財団 (Blue Planet Foundation)</p>	 <p>マノア・ヘリテージ・センター (Mānoa Heritage Center)</p>
 <p>カウアイ・ミュージアム (Kauai Museum)</p>	 <p>マラマ・マウナルア (Mālama Maunaloa)</p>	 <p>イオレ・ステewardシップ・センター (Iole Stewardship Center)</p>	 <p>クプ・ハワイ (KUPU Hawaii)</p>	 <p>ハワイ・ランド・トラスト (Hawaii Land Trust)</p>	 <p>ビショップミュージアム (Bishop Museum)</p>	 <p>パエパエ・オ・ヘ・エイア (Paepae o He'eia)</p>	 <p>サスティナブル・コースト・ラインズ・ハワイ (Sustainable Coastlines Hawaii)</p>	 <p>ポリネシア航海協会 (Polynesian Voyaging Society)</p>	 <p>イオラニ宮殿 (Iolani Palace)</p>

<https://www.allhawaii.jp/Mālamahawaii/community/>

REGENERATIVE TOURISM/DMAP INITIATIVES ~HAWAIIAN EVENT~



ハワイを学ぶラーニングサイト
ALOHA PROGRAM



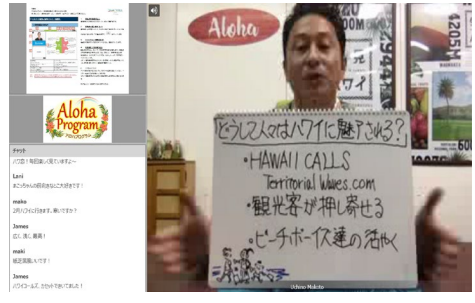
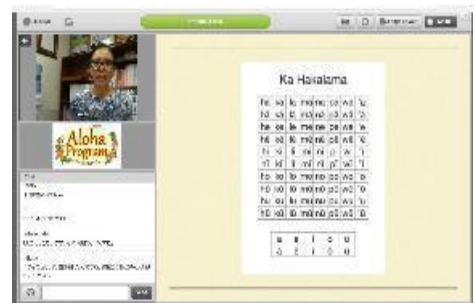
Workshop



Field Trip ~Aloha Program Week in Hawai'i~



Webinar



AP members: **62,009** members

Hawai'i Specialists: **26,703** members

REGENERATIVE TOURISM/DMAP INITIATIVES ~HAWAIIAN CULTURE EVENT~



REGENERATIVE TOURISM/DMAP INITIATIVES ~HAWAI'I MADE PRODUCT PROMOTIONS~

allhawaii



美しい地球を残したい! 母のマ...
子どもたちの肌を守る安全な日焼け止め
を使うことは、未来の子どもたちへ美...

www.allhawaii.jp



ハワイのママキティーで綺麗と...
ハワイに自生するハーブ、ママキの葉を
使ったママキティー。古代ハワイアン...

www.allhawaii.jp



ハワイを思い自然を思うマラマ...
手つかずの大自然に囲まれたカウアイ
島。この島の雄大な自然と大地にイン...

www.allhawaii.jp



食べる
その他
4月23日は地ビールの日! メイドイン
ハワイの地ビールの中から自分のお気
に入りを見つけよう!
今日4月23日は「ビールの日」または「地ビ
ールの日」として知られていることをご存じ
ですか? 日本地ビール協会を中心とする「地
ビールの日選考委員会」が平成11年に定めた
日で、個性豊かな地ビールは、年々人気...

2021.04.23

Event



A close-up photograph of a person's hands pouring water from a brown ceramic pitcher into their cupped hands. The background is a soft-focus field of green grass and small pink flowers. The scene is peaceful and evokes a sense of nature and care.

— MĀLAMA —
HAWAII‘I

地球にやさしい旅を

A vibrant rainbow arches across the sky, spanning from the left edge of the frame to the right, where it meets the ocean. The rainbow's colors are bright and distinct, with red at the top and violet at the bottom. Below the rainbow, a lush green valley with steep, forested hillsides descends to a small, sandy beach. The ocean is a deep turquoise color, with white waves crashing against the rocky shore. The overall scene is a beautiful, natural landscape.

Mahalo Nui Loa

HAWAII TOURISM
JAPAN