

The logo for Hawai'i Tourism Japan features the words "HAWAII TOURISM" in a white, serif font, with a thin red and blue horizontal line passing through the letter "I" in "HAWAII". Below this, the word "JAPAN" is written in a smaller, white, sans-serif font.

HAWAII TOURISM
JAPAN

Japan Summit 2023

Mitsue Varley
Japan, Country Director

The text "MARKET SITUATION" is displayed in a bold, white, sans-serif font, centered over a background image of two green citrus fruits on a tree branch.

MARKET SITUATION

Hawai'i Tourism at a Glance

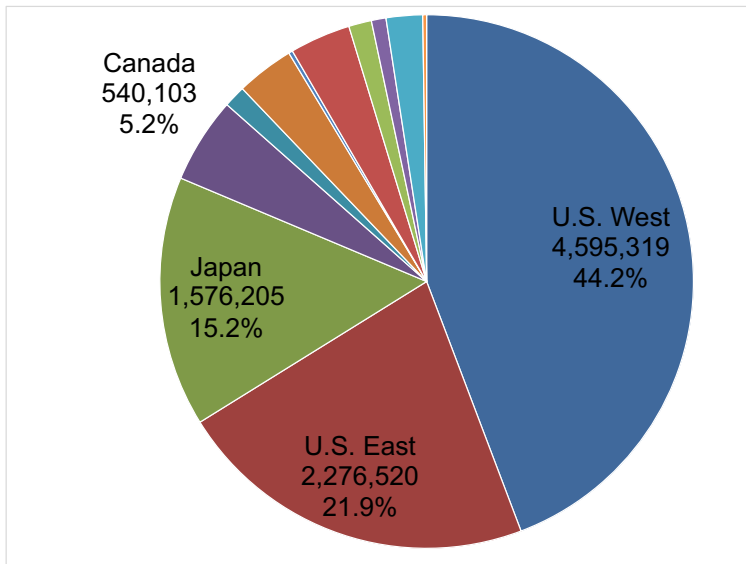
	2013	2014	2015	2016	2017R	2018	2019	2020	2021	2022P ¹
Spending	\$14.52B	\$14.97B (+3.1%)	\$15.11B (+0.9%)	\$15.91B (+5.3%)	\$16.79B (+5.5%)	\$17.64B (+5.1%)	\$17.84B (+1.1%)	\$5.16B ² (-71.1%)	\$13.15B (+154.8%)	\$19.32B (+46.8%)
Tax Revenue	\$1.54B	\$1.58B (+2.6%)	\$1.71B (+7.0%)	\$1.86B (+8.8%)	\$1.96B (+5.4%)	\$2.08B (+6.8%)	\$2.07B (+0.4%)	\$0.6B ² (-70.8%)	\$1.53B (+153.7%)	\$2.24B (+46.0%)
Jobs Supported	168K	174K (+3.6%)	177K (+1.7%)	194K (+9.6%)	205K (+5.7%)	217K (+6.8%)	217,000 (+0.9%)	63,000 ² (-71%)	160,000 (+154.1%)	197,000 (+23.1%)
Arrivals	8.17M	8.32M (+1.8%)	8.68M (+4.3%)	8.93M (+2.9%)	9.40M (+5.3%)	9.95M (+5.9%)	10.39M (+5.0%)	2.71M (-73.9%)	6.78M (+150.3%)	9.25M (+36.4%)
Air Seats	10.9 M	11.3M (+3.7%)	11.9M (+5.7%)	12.0M (+0.7%)	12.2M (+1.8%)	13.2M (+8.3%)	13.62M (+2.9%)	5.32M (-60.9%)	10.74M (+101.8%)	12.75M (+18.7%)

¹ 2022 data are preliminary

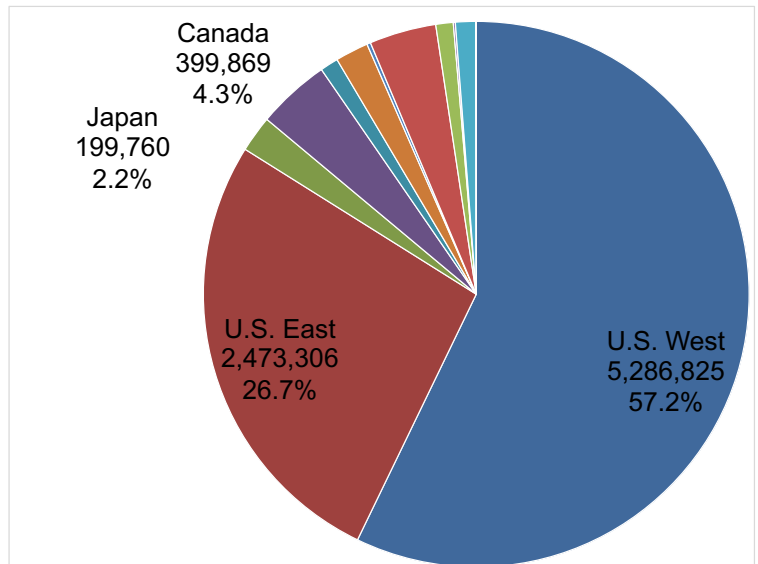
² 2020 expenditures were estimated by DBEDT. 2020 spending statistics from U.S. West and U.S. East visitors were available from January – March, November and December 2020. Visitor surveys were not conducted from April-October 2020 due to COVID-19 restrictions. For Japan, Canada, Other Asia, Oceania, Europe and Latin America, visitor spending data were only available from January-March 2020; data for November and December were not available due to limited samples. Tax revenue generated and jobs supported were calculated using this estimate.

Visitor Arrival Mix 2022P vs 2019

2019



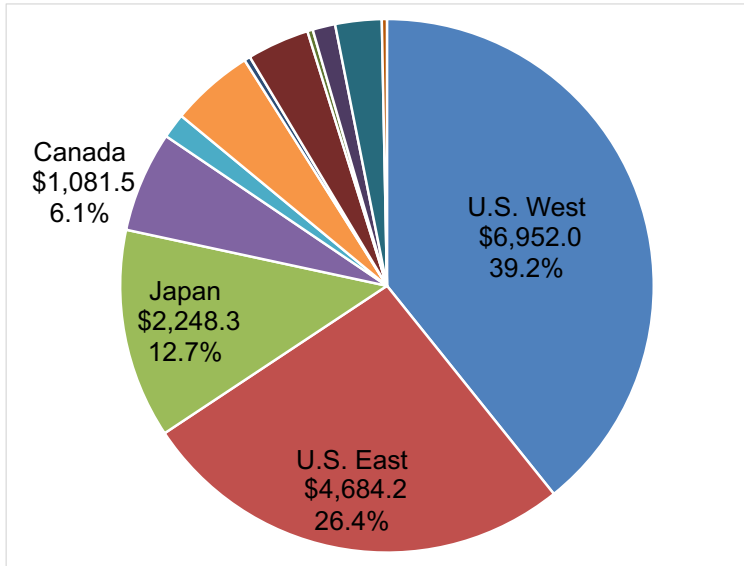
2022P



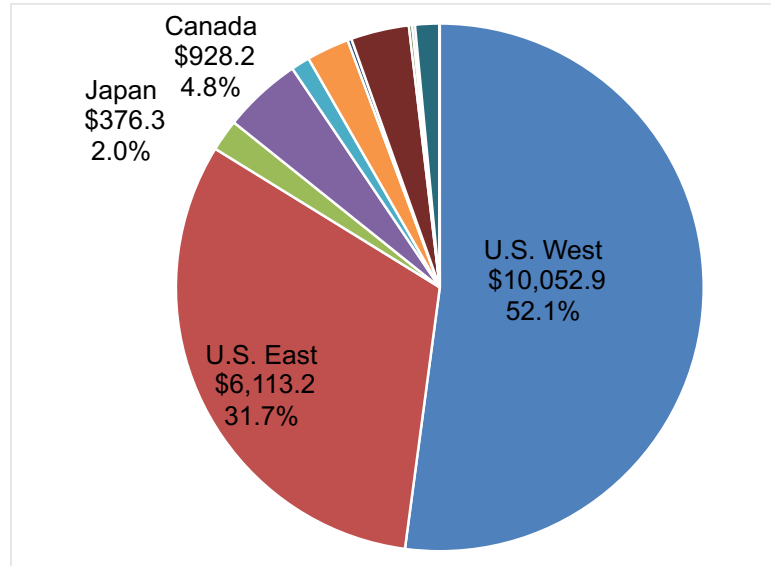
Note: 2022 figures are preliminary.

Visitor Spending Mix 2022P vs 2019

2019

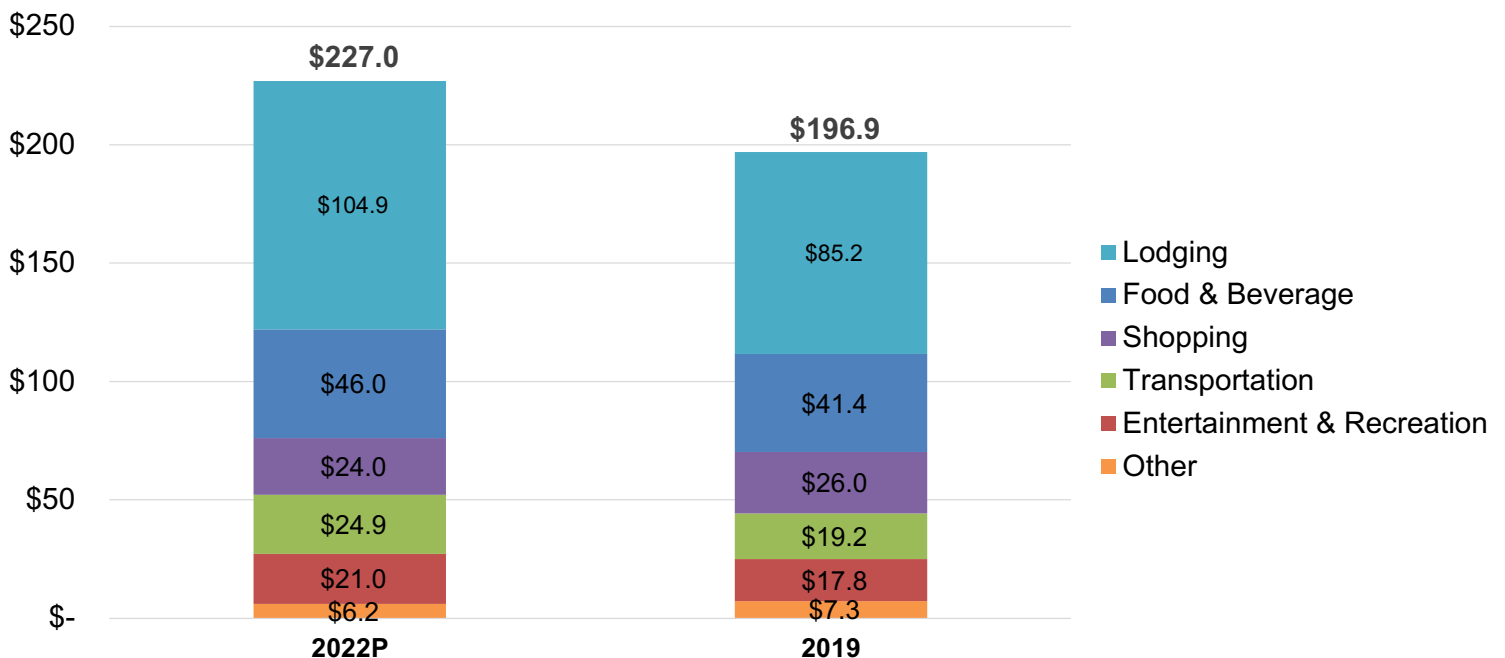


2022P



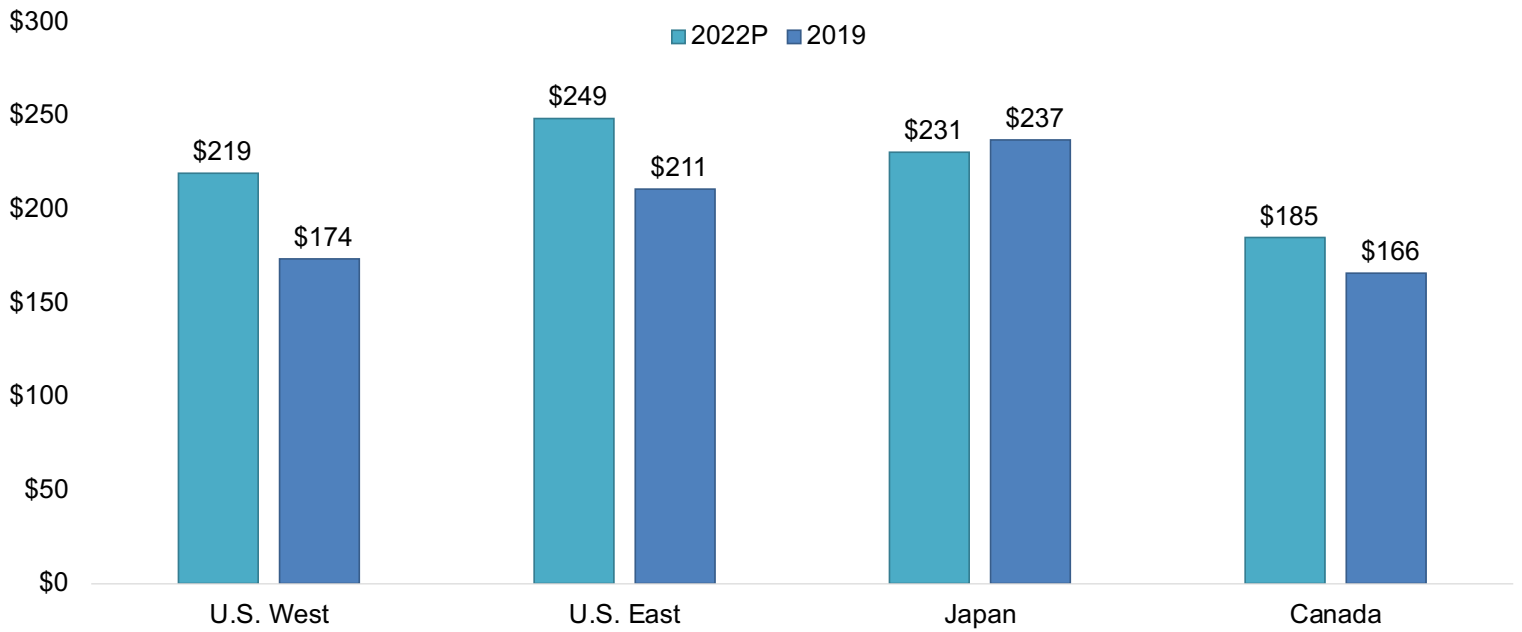
Note: 2022 figures are preliminary.

Spending by Category 2022P vs 2019



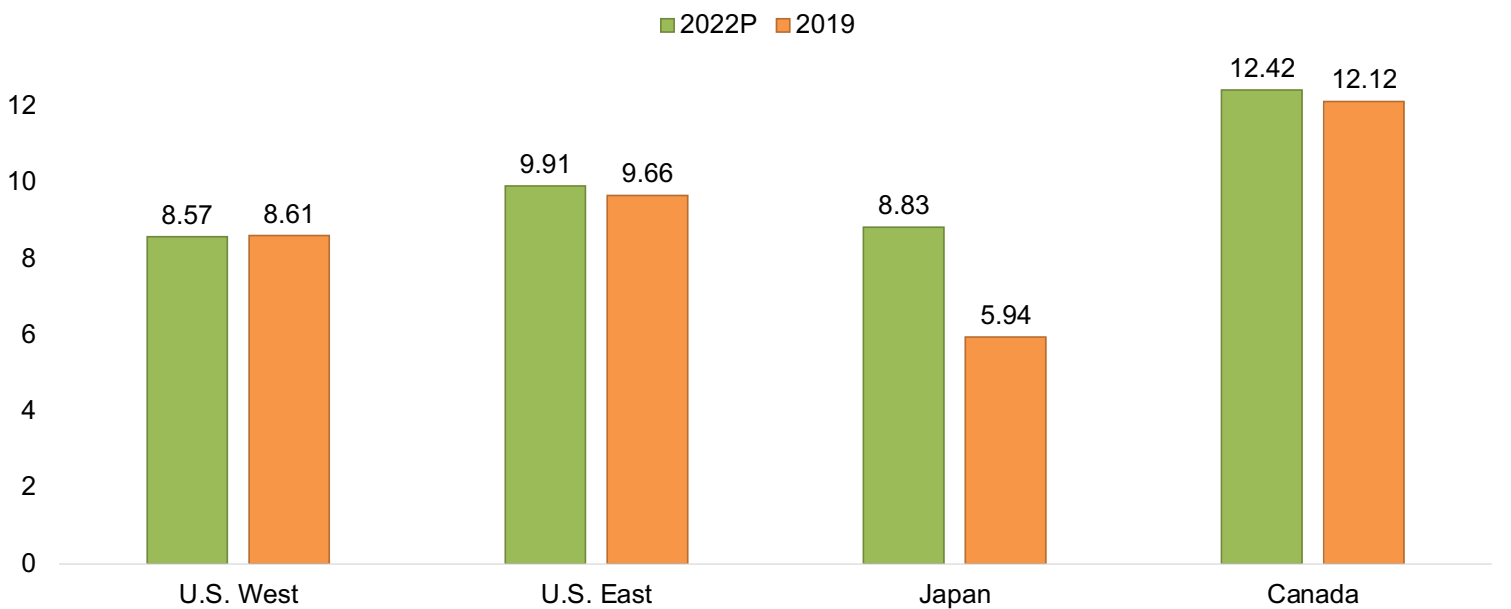
Note: 2022 figures are preliminary.

Personal Daily Spending – 2022P vs. 2019



Note: 2022 figures are preliminary.

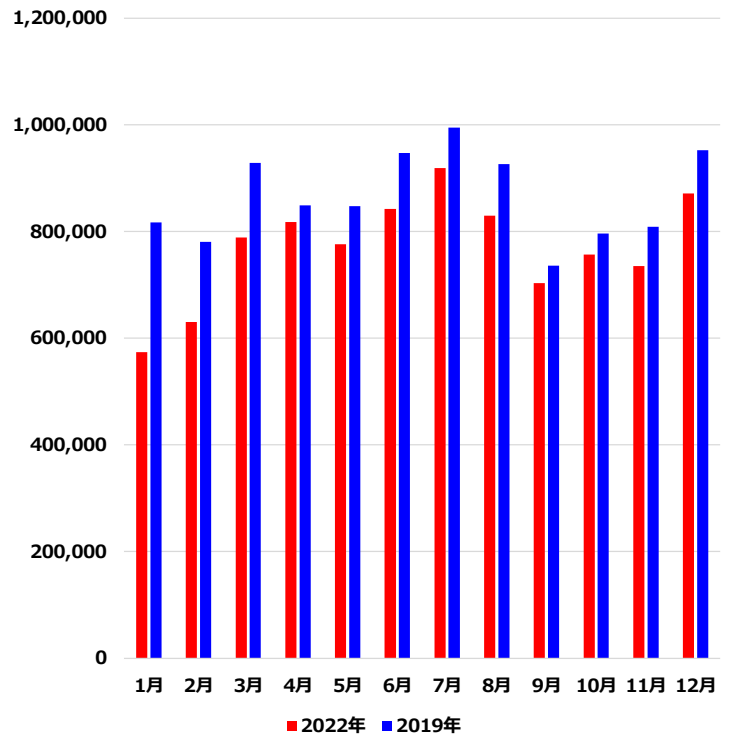
Average Length of Stay – 2022P vs. YTD 2019



Note: 2022 figures are preliminary.

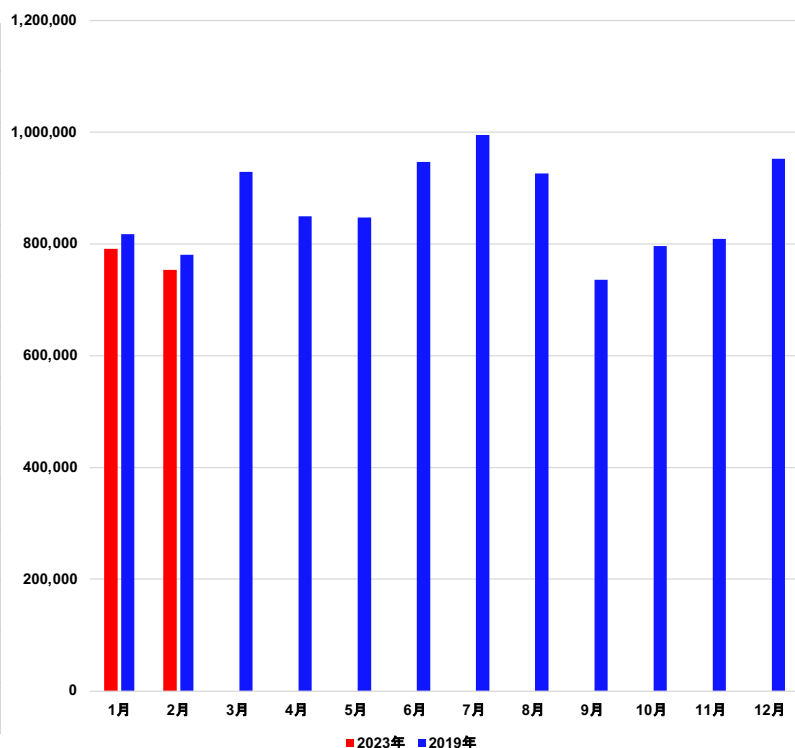
2022 (vs2019) Total visitor arrival

	2022	2019	% vs 2019
Jan	574,183	817,600	-29.77%
Feb	630,647	780,827	-19.23%
Mar	788,931	928,849	-15.06%
Apr	818,268	849,398	-3.66%
May	776,375	847,396	-8.38%
Jun	842,928	947,112	-11.00%
Jul	919,154	995,210	-7.64%
Aug	829,699	926,417	-10.44%
Sep	703,271	736,155	-4.47%
Oct	757,182	796,191	-4.90%
Nov	735,340	809,076	-9.11%
Dec	871,870	952,441	-8.46%
Total	9,247,848	10,386,672	-10.96%



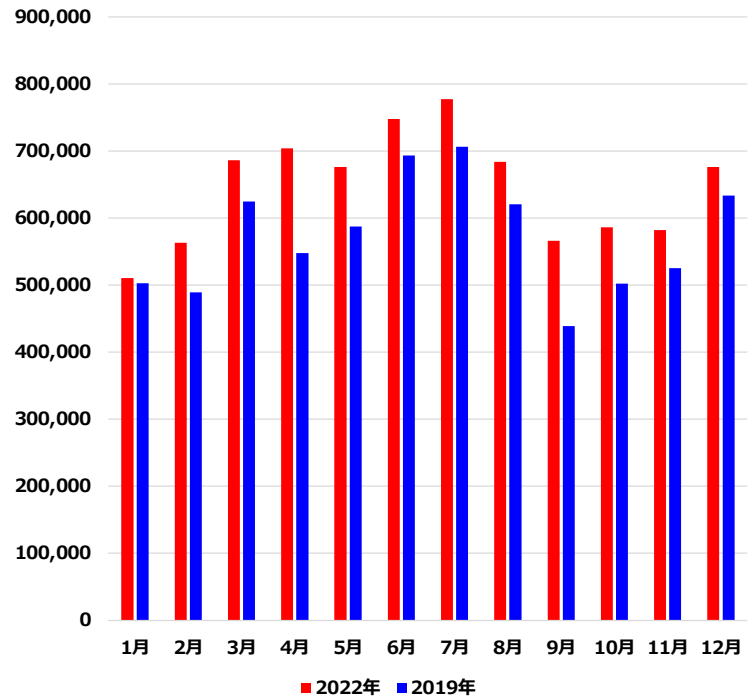
2023 (vs2019) Total visitor arrival

	2023	2019	% vs 2019
Jan	791,781	817,600	-3.16%
Feb	753,750	780,827	-3.47%
Mar		928,849	
Apr		849,398	
May		847,396	
Jun		947,112	
Jul		995,210	
Aug		926,417	
Sep		736,155	
Oct		796,191	
Nov		809,076	
Dec		952,441	
Feb YTD	1,545,531	1,598,427	-3.31%



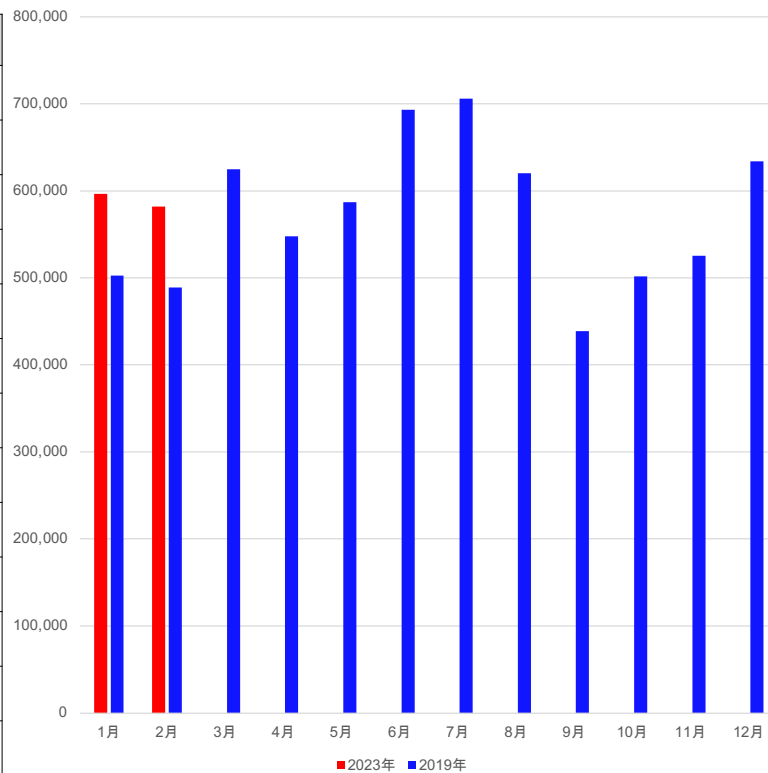
2022 (vs2019) US visitor arrival

	2022	2019	% vs 2019
Jan	510,460	502,908	1.50%
Feb	563,519	489,011	15.24%
Mar	686,038	624,697	9.82%
Apr	703,746	547,688	28.49%
May	676,133	587,188	15.15%
Jun	748,042	693,181	7.91%
Jul	777,476	706,174	10.10%
Aug	684,063	620,409	10.26%
Sep	566,110	438,993	28.96%
Oct	586,541	502,082	16.82%
Nov	581,938	525,630	10.71%
Dec	676,064	633,878	6.66%
Total	7,760,130	6,871,839	12.93%



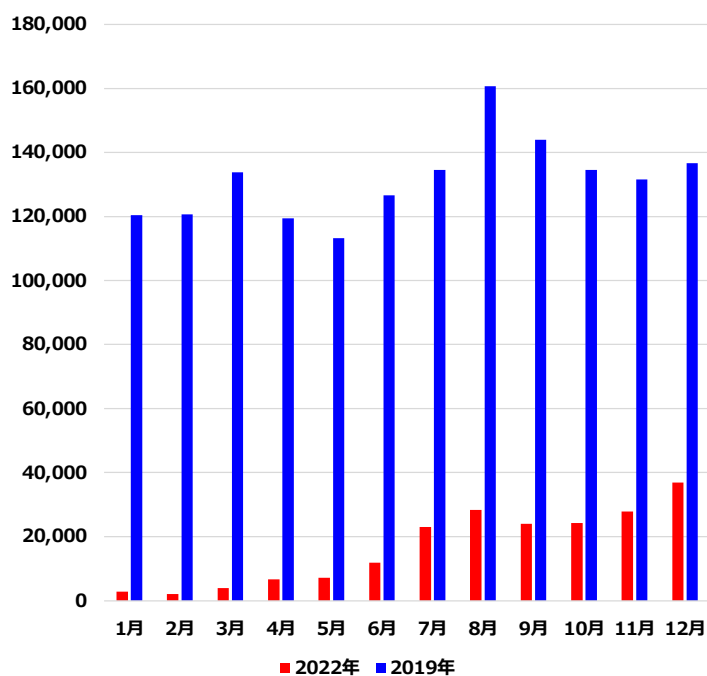
2023 (vs2019) US visitor arrival

	2023	2019	% vs 2019
Jan	596,637	502,908	18.64%
Feb	582,065	489,011	19.03%
Mar		624,697	
Apr		547,688	
May		587,188	
Jun		693,181	
Jul		706,174	
Aug		620,409	
Sep		438,993	
Oct		502,082	
Nov		525,630	
Dec		633,878	
Feb YTD	1,178,702	991,919	18.83%



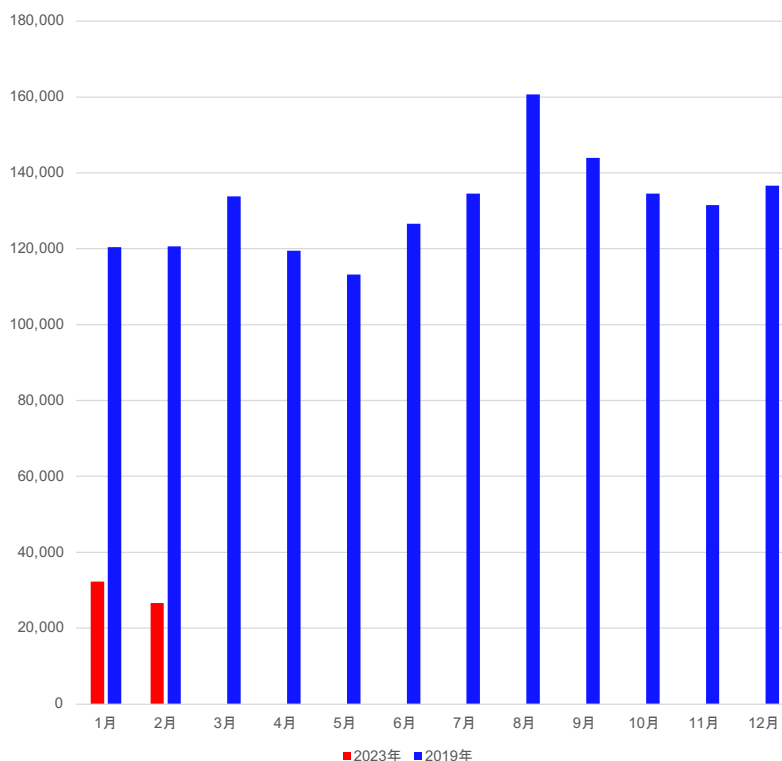
2022 (vs2019) Japan visitor arrival

	2022	2019	% vs 2019
Jan	2,850	120,418	-97.63%
Feb	2,181	120,653	-98.19%
Mar	4,038	133,858	-96.98%
Apr	6,749	119,487	-94.35%
May	7,167	113,226	-93.67%
Jun	11,940	126,592	-90.57%
Jul	23,133	134,587	-82.81%
Aug	28,384	160,728	-82.34%
Sep	24,092	143,928	-83.26%
Oct	24,339	134,557	-81.91%
Nov	27,898	131,536	-78.79%
Dec	36,988	136,635	-72.93%
Total	199,759	1,576,205	-87.33%

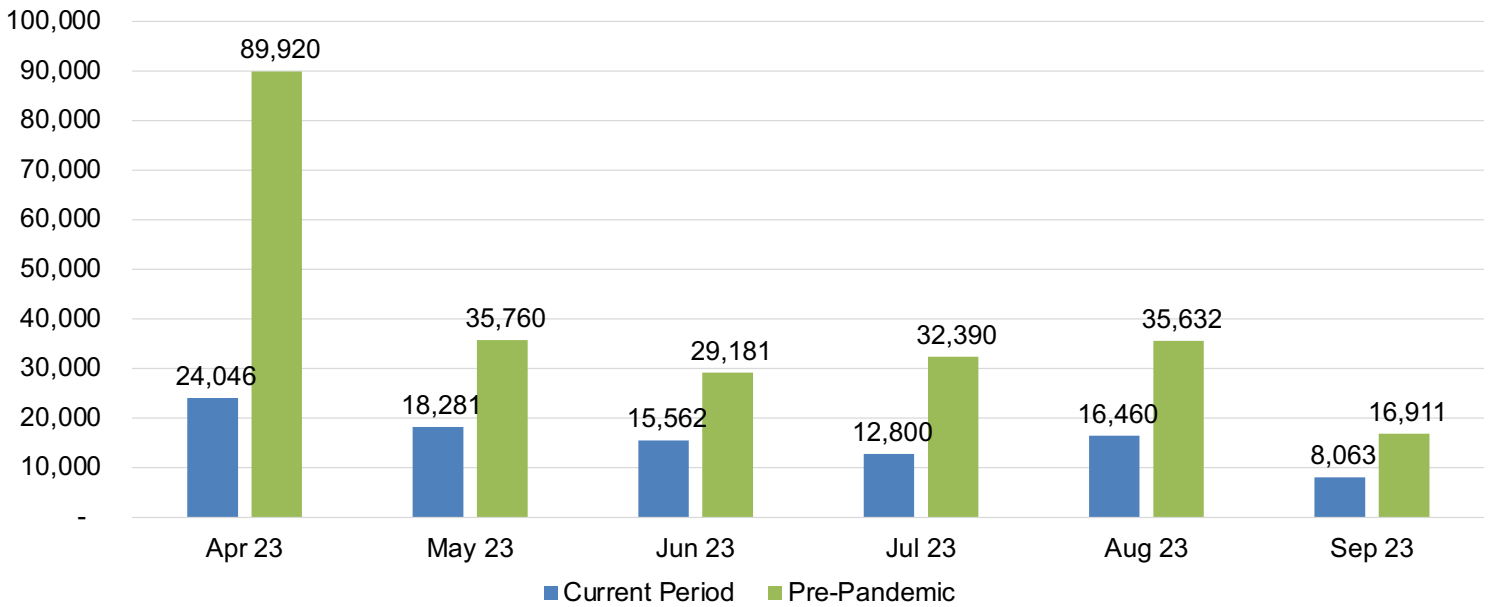


2023 (vs2019) Japan visitor arrival

	2023	2019	% vs 2019
Jan	32,305	120,418	-73.17%
Feb	26,650	120,653	-77.91%
Mar		133,858	
Apr		119,487	
May		113,226	
Jun		126,592	
Jul		134,587	
Aug		160,728	
Sep		143,928	
Oct		134,557	
Nov		131,536	
Dec		136,635	
Feb YTD	58,955	241,071	-75.54%



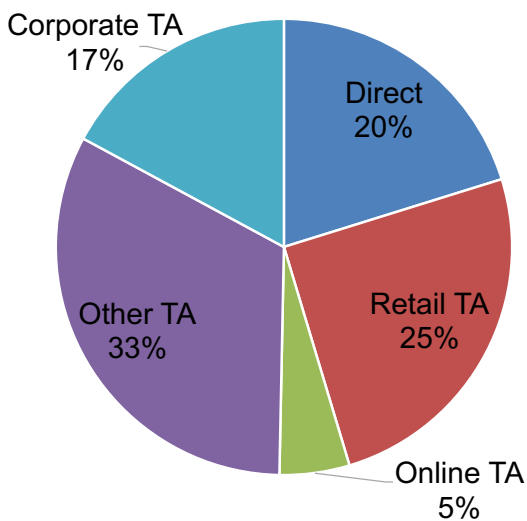
Six Month Outlook: Japan



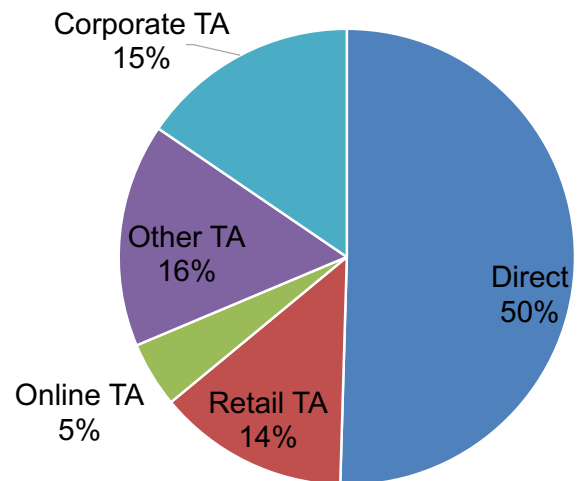
Source: ARC/ForwardKeys Destination Gateway, as of April 10, 2023

Distribution Channel: Japan

Pre-Pandemic



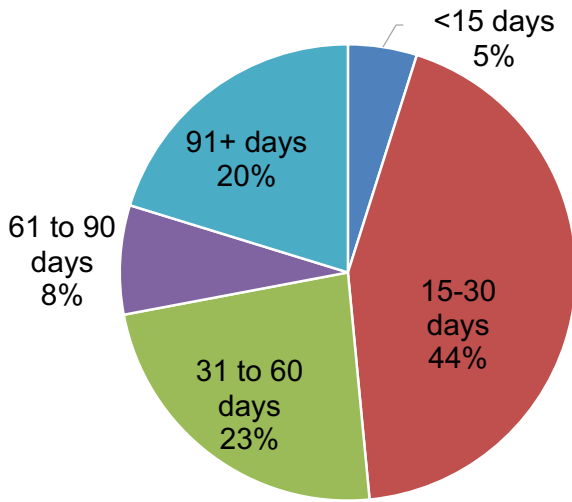
Current Period



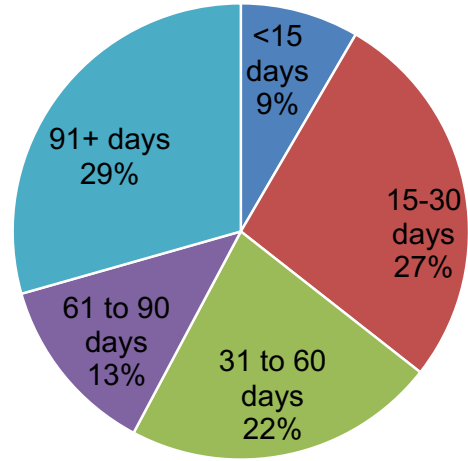
Source: ARC/ForwardKeys Destination Gateway, as of April 10, 2023

Lead Time: Japan

Pre-Pandemic



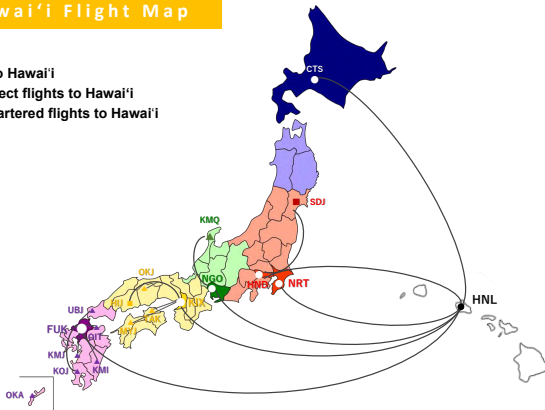
Current Period



Source: ARC/ForwardKeys Destination Gateway, as of April 10, 2023

JAPAN-Hawai'i Flight Map

- 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%



Outbound Travel / Travel Sentiment

- Return of inbound foreigner to stimulate Japan's economy
- Domestic travel promotion by Japanese government
- JATA has a goal to exceed 2019's 20 million outbound trips by 2025
- Mask mandate became optional (3/13/23)
- Downgrade COVID-19 to Class 5 under the Infectious Diseases Control Law (5/8/23)
- Hawai'i remains top destination of choice

Competitive Landscape



Short Haul Destinations

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



Long Haul Destinations

- Europe
- Canada
- Australia

TARGET AUDIENCE

Target Audience



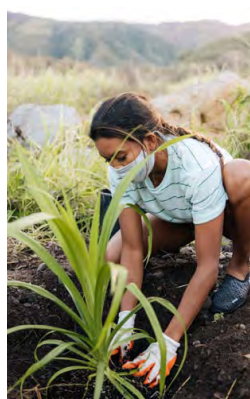
**Affluent
Traveler**



**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

JAPAN MARKET STRATEGY



Strategy

- Accelerate immediate recovery efforts by regaining direct flight access and implementing targeted promotions to build travel momentum
- Showcase Hawai'i's brand appeal over competing destinations
- Cultivate mindful travelers as sustainability ambassadors for Hawai'i
- Drive multi-island visitations
- Expand pre- and post-arrival education at events, satellite offices and through travel partners and lounges



Q1 REVIEW

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.



DIRECT CONSUMER INITIATIVES

- Shibuya digital signage 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



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

Media Exposure



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

Hōkūle'a movie screening

- Conducted MOANANUIĀKEA movie screening in Okinawa on 3/11
- Invited Hōkūle'a crews at each cities to share their stories
- Total 2,225 audience participated in 9 cities since 2022
- Generated total 469,386,252 imp and 1,003,882.17 AVE for the media exposure



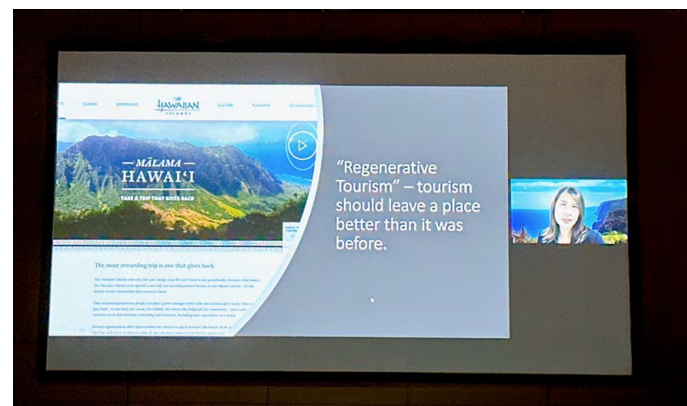
FAM Tours



Education

- Hawaii'i Online Forum
- JATA JOTC Webinar
- Kinjo University Web Seminar
- UNWTO International Symposium on Green Tourism 2023
- Keidanren Japanese Business Federation
- JTB Hawaii'i Culture Seminar

More than 1,200 educated

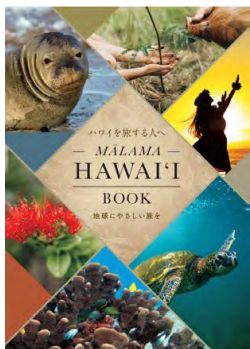


FUTURE INITIATIVES



Hawai'i Core Brand Messaging

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



Romance Promotion

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



Our Purpose

This project will promote "the appeal of Hawai'i travel in the Hawai'i romance market" to increase commemorative travel to Hawai'i not only for weddings and honeymoons, but also for families and couples.



Build long-term tourism value in Hawai'i

- Improve understanding and satisfaction of Hawai'i's tourism industry in the Hawaiian community
- Improve visitors' satisfaction with Hawai'i
- Increase visitors' consumption in Hawai'i
- Recovery of the Japanese market



Recovery of the Hawai'i wedding industry

- Especially this year, we will work on the recovery of the wedding industry.
- Long-term value creation in the Hawai'i romance market as well as weddings
- Connect to business not only for JHWA, but also for the romance industry as a whole

As part of Hawai'i's tourism strategy, this is the preliminary stage of the project.

Businesses become one team to play the role.



Connecting heart to heart
A trip to pledge one's love

- #01 Beach Wedding Trip
- #02 Chapel Wedding Trip
- #03 Hotel Wedding Trip
- #04 Mansion Wedding Trip



Connecting heart to heart
Trip to Celebrate Anniversary

- #05 Vow Renewal Trip
- #06 10 Year Wedding Anniversary Trip
- #07 Silver Wedding Anniversary Trip
- #08 Gold Wedding Anniversary Trip



Hawai'i's Wedding Industry Unites,

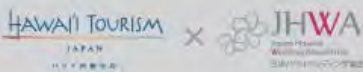
to Revive Romance Trips and



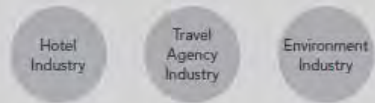
the Hawai'i's Tourism Industry as a Whole

Connecting Heart to Heart

With the support of Hawai'i Tourism Japan,
the Japan Hawai'i Wedding Association stands up!



Various industries involved in the wedding
industry are also participating!



Developed into a Hawai'i
movement to revive Hawai'i's
tourism industry as a whole!

We aim to create a project that will make everyone say,
"Thanks to JHWA, Hawai'i's Tourism Industry is back on track! "

Promotion-1

Hawai'i Tourism Japan develops promotions in Japan!

From target marketing, PR within Hawai'i events, campaign videos, etc.

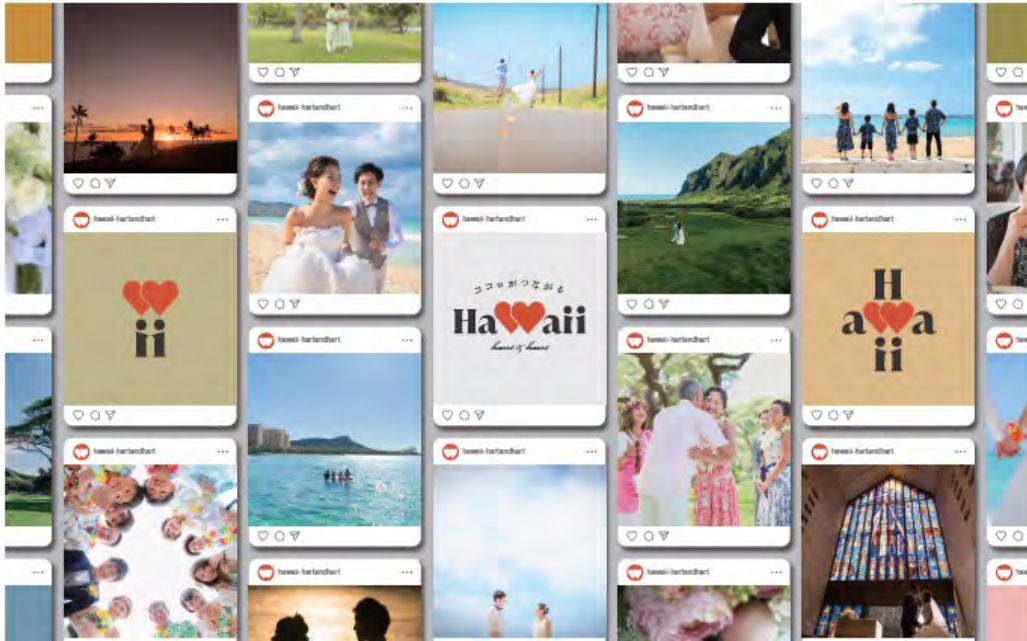


- Target Marketing (digital advertising, etc.)
- PR at Hawai'i events in Japan

- Campaign videos (YouTube)

Produced using video materials owned by JHWA companies.
Editing will be done by JHWA member video companies.

JHWA operates a social networking service using photos and videos owned by JHWA companies!



•Social Media
Post and share in accordance with the project concept



Golf Promotion

- Neighbor island golf course promotion
- Golf page renewal
- Collateral creation
- Promotional video creation
- Database targetting campaigns



GOLFGUIDE

オアフ/マウイ/ハワイ/カウアイ/ウナイ

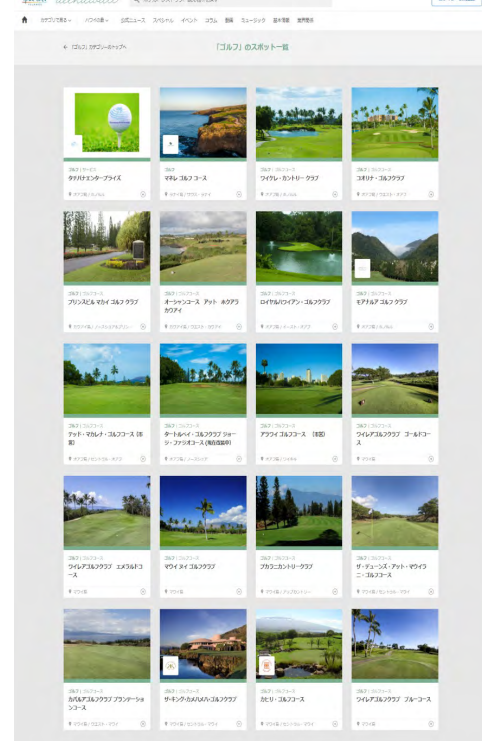
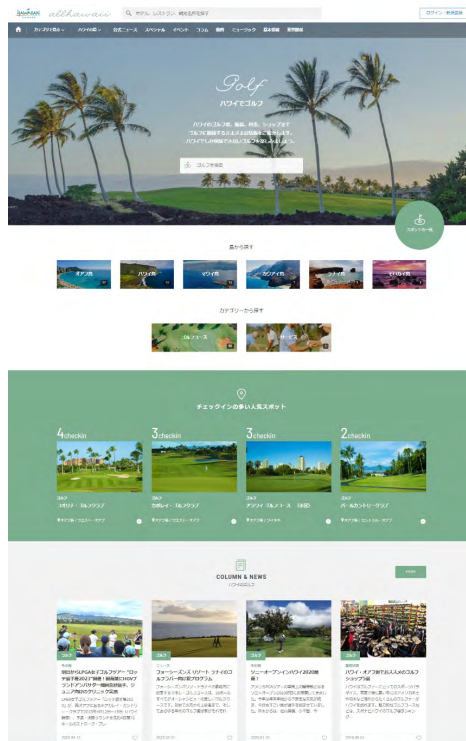
5つの島のコースを
楽しみつくす!

ハワイでラウンドすべき理由
を知り、ローカルルールを完全解説
。設備たちが語るハワイゴルフの魅力
。ゴルフ場 | SNS | 観光 | 体験

エモーションナルに楽しむ
*Hawaii
Golf Trip*

allhawaii

ハワイ州観光局 公式ポータルサイト



CONCEPT

PLAY GOLF!!
PLAY HAWAII



Hawai'i EXPO (May 27-28 @Shibuya Hikarie Hall)



In partnership with Shibuya city
2023 Target Goal : 12K pax Consumers

Major Hawai'i Events in Japan

Date	Event	Location	Attendees
5/18 – 5/21	RKB Aloha Monarch Hawai'i Matsuri	Hakata Daimaru Passage	30,000
5/19-5/21	Aloha Tokyo	Ebisu Garden Place	184,000
5/26-5/28	JST Nagoya Hawai'i Festival	Oasis 21	85,000
6/2-6/4	Aloha Yokohama	Yokohama Akarenga Souko	45,000
July	Hankyu Hawai'i Fair	Hankyu Umeda Store	30,000
10/26-10/29	Tourism EXPO Japan 2023	INTEX Osaka	124,074



Private Sector Collaboration



Calbee



LOTTE



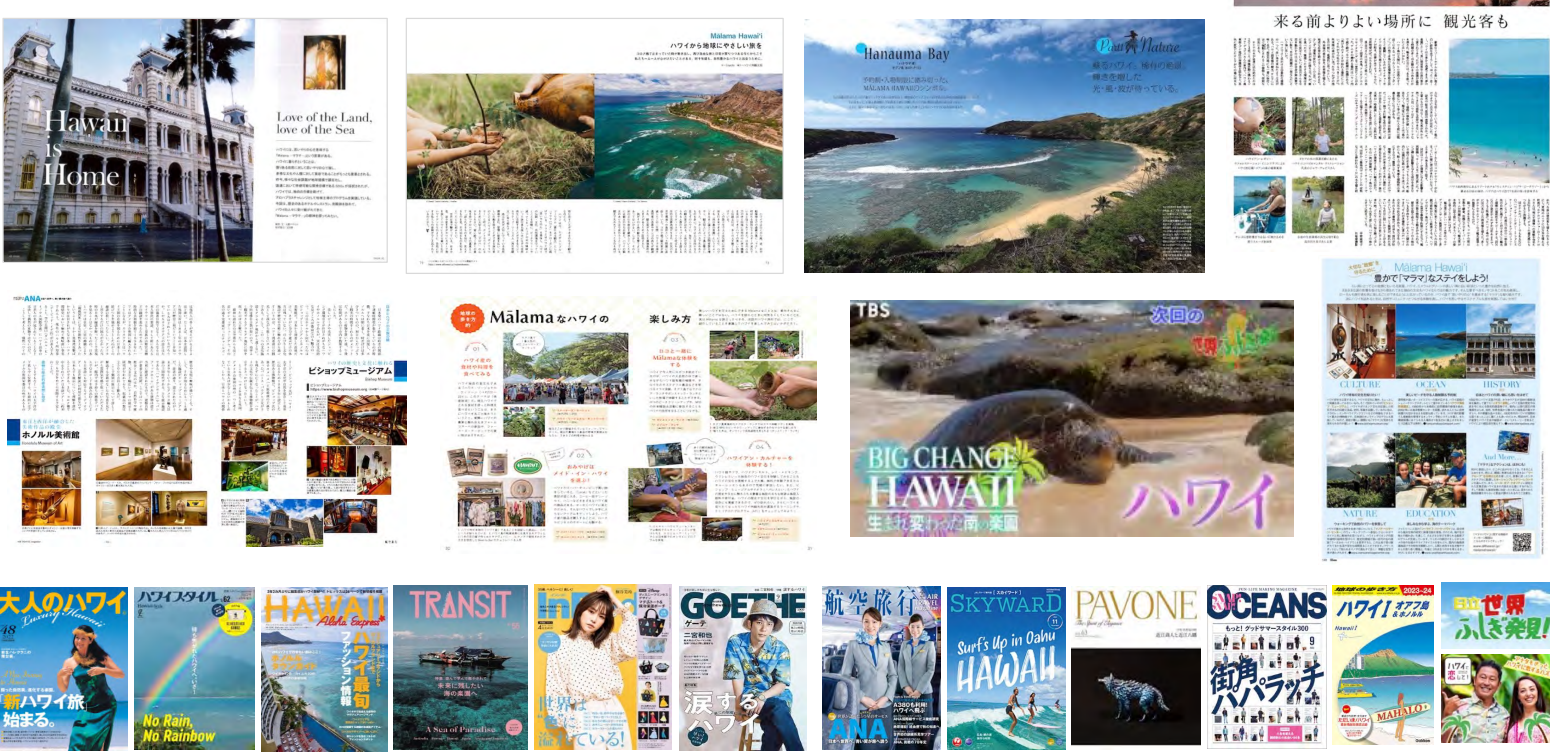
Baskin Robins



Seven Eleven



Media Relations ~Mālama Hawai'i 100~



2023 Travel Trade initiatives

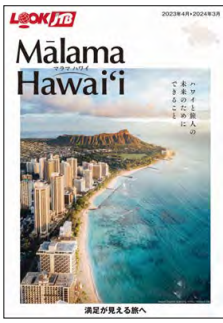
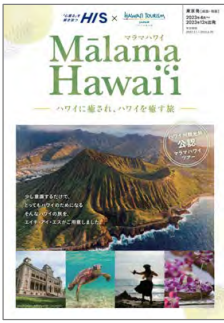


Educational FAM



Experience authentic Hawai'i to develop new Hawai'i products

Product Development



Experience and spread awareness of Mālama

Hawai'i Satellite Group



349 stores
74 groups
As of Apr '23

Chugoku / Shikoku
38 stores

Chubu
31 stores

Koshinetsu Hokuriku
13 stores

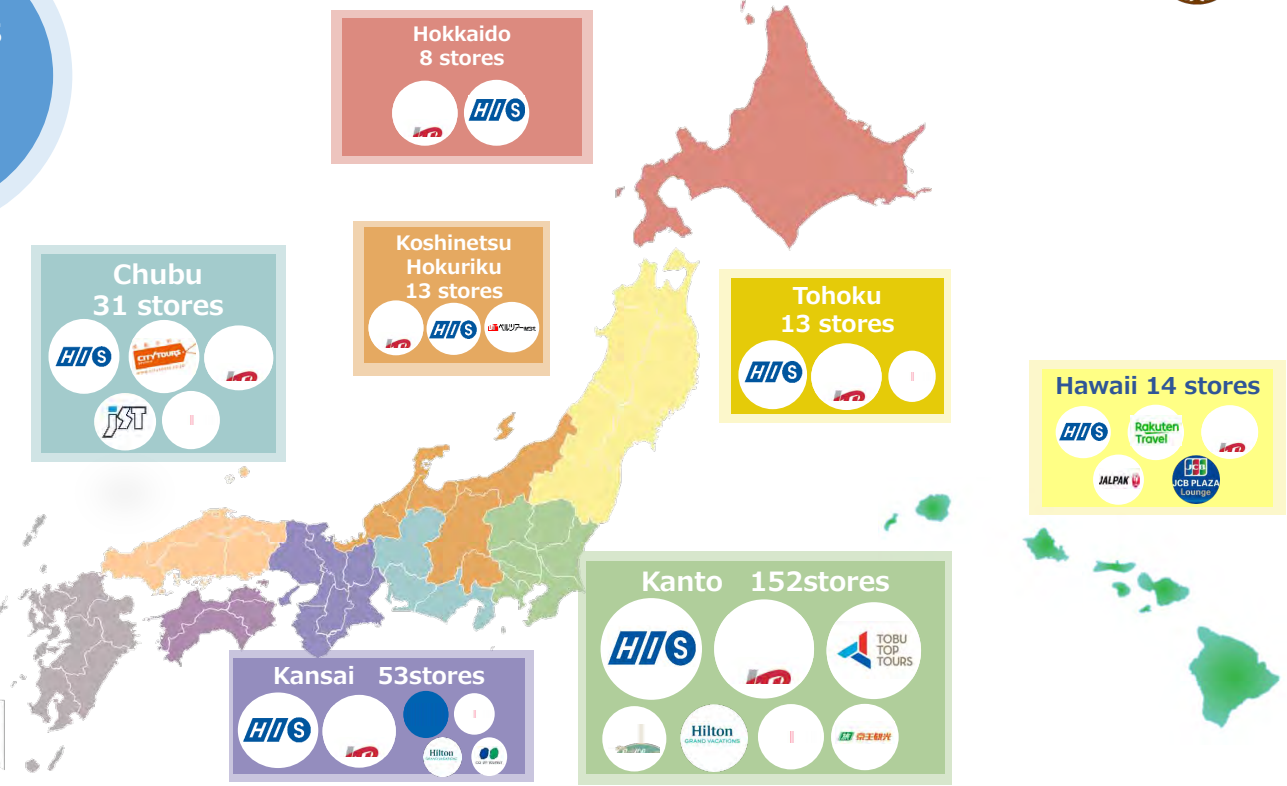
Tohoku
13 stores

Hawaii 14 stores

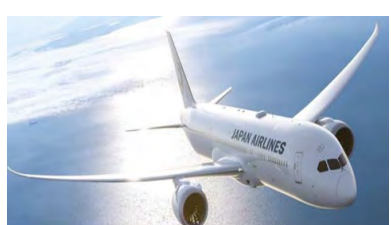
Kyushu / Okinawa
26 stores

Kansai 53 stores

Kanto 152 stores



Co-op Program



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

State of Hawai‘i

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

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 Hawai‘i

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

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

Education Tour Program



Conducting seminars for educational officials

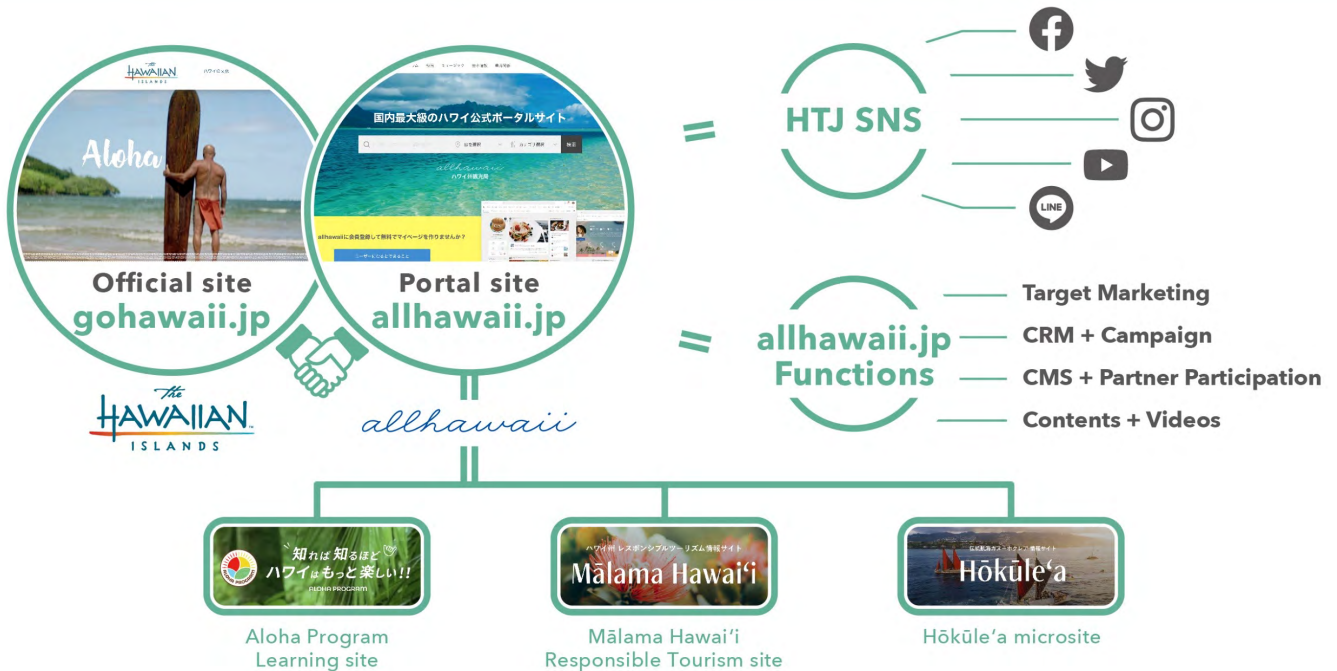
Date: 11/21-11/22, 2023
 Location: Tokyo (Imperial Hotel)

Japan Mission

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



Hawai'i Tourism Japan Digital Platform



Hawai'i Travel Trade Site

Visitor statistics, Presentation, News, Information for travel trade



Travel trade twitter

@htjbiz



アロハプログラム
公式ラーニングサイト



マラマハワイ
レスポンスブルツーリズム情報サイト



伝統航海カヌー「ホクレーア」
情報サイト



HAWAII TOURISM
JAPAN