Editor’s Message

*Otsukaresamadeshita* (job well done) to all of you in Hawai‘i for your hard work and endurance during the recent APEC event. We hope this is just the beginning of prosperous new business for Hawai‘i going forward.

Speaking of beginnings, the market is finally beginning to recover with positive Japanese arrivals for the first time since the March 11 disasters (P1), and a slight increase in total Japanese outbound travel, YTD (P2). As the year winds down, there is still a lot going on in Japan (P3) and a lot of Good News for Hawai‘i (P4). Read on find out how you can take advantage of more marketing opportunities through the end of this year (P 5). Mahalo for your continued support and have a Happy Thanksgiving!

**Visitor Statistics**

**Total Arrivals: September 2011**
Visitor statistics were positive during the month of September, with increases in: total visitor arrivals (+4%), average length of stay (+2%), visitor days (+6%), per person per day (+13%) and per trip spending (+15%) and total expenditures (+20%) for the month.

Likewise, year-to-date (YTD) statistics remain positive, with increases across the board, in comparison to the same period last year: visitor arrivals (+3%), average length of stay (+2%), visitor days (+4%), per person per day spending (+10%), per trip spending (+12%) and total expenditures (+15%).

**Japanese Arrivals: September 2011**
With September’s Silver Week (consecutive three-day weekends) holidays, travel during this period has become increasingly popular. As a result, visitor arrivals increased for the first time since February (+1%). In conjunction with continual increases in average length of stay (+2%), total visitor days (+3%) also improved. The strength of the yen has also helped to increase per person per day (+12%) and per trip (+14%) spending, resulting in positive growth in total expenditures (+15%).

YTD, Japanese arrivals (-7%) and visitor days (-5%) continue to improve with smaller declines. Average length of stay remains positive (+3%) along with average spending per day (+11%), per trip (+14%), and total expenditures (+6%).

**Japanese Arrivals: September 2011 (Per Island & Travel Trends)**

Japanese arrivals to all island except Hawai‘i island increased during the month of September. Total arrivals to O‘ahu slightly increased (+2%), along with O‘ahu-only visitors (+4%), slowly improving YTD arrivals to the island. Kaua‘i’s total Japanese arrivals improved in September (+1%), resulting in positive arrivals YTD (+3%). Kaua‘i-only arrivals declined (-34%) in September but remain up YTD (+44%). Maui County was a popular destination among Japanese in September, with double-digit increases in total arrivals to the County and island of Maui (+17%), and Maui-only visitors (+11%). YTD however, Japanese arrivals remain slightly down for Maui. In comparison to the same period last year, total Japanese arrivals (-13%) and island-only arrivals (-18%) to Hawai‘i Island continues to decline, resulting in double digit declines, YTD.

Hotel bookings remained unchanged in September, and continues to recover YTD (-8%) with less significant declines. Condo bookings (+11%) and timeshare stays (+27%) increased significantly in comparison to last
September, strengthening YTD statistics for both condos (+5%) and timeshares (+4%).

While vacation travel slightly declined (-4%), wedding (+5%) and honeymoon (+12%) showed positive growth in September. However, YTD, the wedding (-6%) and honeymoon (-7%) markets remain down, along with vacation travel (-8%). While the MICE market declined in September (-24%), it remains positive YTD (+18%) and is expected to improve with APEC this month.

Most Japanese traveling to the islands continue to be repeat visitors (57%). While the majority arrange travel through group (-18%) or package (-6%) deals, these booking methods are on the decline. The trend toward non-package (+22%) and independent travel (+25%) are becoming more popular, resulting in positive growth YTD.

<table>
<thead>
<tr>
<th>Arrivals Per Island</th>
<th>Sep 2011</th>
<th>%</th>
<th>YTD 2011</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>O’ahu</td>
<td>111,461</td>
<td>1.6%</td>
<td>832,358</td>
<td>-6.5%</td>
</tr>
<tr>
<td>* O’ahu only</td>
<td>94,324</td>
<td>3.5%</td>
<td>702,933</td>
<td>-5.2%</td>
</tr>
<tr>
<td>Kaua'i</td>
<td>2,275</td>
<td>1.4%</td>
<td>16,148</td>
<td>2.7%</td>
</tr>
<tr>
<td>* Kaua'i only</td>
<td>223</td>
<td>-33.8%</td>
<td>2,246</td>
<td>44.4%</td>
</tr>
<tr>
<td>Maui County</td>
<td>5,902</td>
<td>16.9%</td>
<td>45,837</td>
<td>-3.1%</td>
</tr>
<tr>
<td>* Maui</td>
<td>5,762</td>
<td>16.6%</td>
<td>44,638</td>
<td>-4.1%</td>
</tr>
<tr>
<td>* Maui only</td>
<td>1,198</td>
<td>10.5%</td>
<td>8,472</td>
<td>-2.8%</td>
</tr>
<tr>
<td>Hawai'i</td>
<td>16,372</td>
<td>-12.8%</td>
<td>117,339</td>
<td>-19.0%</td>
</tr>
<tr>
<td>*Hawai'i only</td>
<td>3,643</td>
<td>-17.7%</td>
<td>22,540</td>
<td>-28.0%</td>
</tr>
<tr>
<td>Accommodations</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hotel</td>
<td>101,818</td>
<td>0.1%</td>
<td>746,736</td>
<td>-8.3%</td>
</tr>
<tr>
<td>Condo</td>
<td>11,913</td>
<td>10.8%</td>
<td>97,270</td>
<td>5.4%</td>
</tr>
<tr>
<td>Timeshare</td>
<td>5,473</td>
<td>26.7%</td>
<td>32,800</td>
<td>4.4%</td>
</tr>
</tbody>
</table>

Japan Outbound Travel: Sep 2011
Due to Silver Week in September, pent up demand and the strength of the yen, Japanese outbound travel increased during the month (+7%), resulting in the first YTD increase in Japanese departures since the March 11 disasters.

Asian destinations continue to benefit from last-minute booking trends: Singapore (+23%), Taiwan (+44%), Thailand (+27%) and Vietnam (+8%) Travel to long-haul destinations, although down, are showing signs of recovery toward the end of the third quarter.

According to Japan Tourism Agency (JTA), YTD, H.I.S. is reporting the highest outbound travel sales (+13%), followed by JTB World Vacations (+2%), Hankyu Express International (+28%) and Kinki Nippon Tourist (+3.9%).

<table>
<thead>
<tr>
<th>Purpose of Trip</th>
<th>Sep 2011</th>
<th>%</th>
<th>YTD 2011</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pleasure</td>
<td>102,198</td>
<td>-2.6%</td>
<td>756,513</td>
<td>-8.3%</td>
</tr>
<tr>
<td>*Honeymoon</td>
<td>20,119</td>
<td>11.5%</td>
<td>133,878</td>
<td>-7.0%</td>
</tr>
<tr>
<td>*Get Married</td>
<td>5,655</td>
<td>4.6%</td>
<td>38,462</td>
<td>-5.9%</td>
</tr>
<tr>
<td>*Vacation</td>
<td>81,932</td>
<td>-4.4%</td>
<td>617,580</td>
<td>-8.3%</td>
</tr>
<tr>
<td>MICE</td>
<td>2,508</td>
<td>-24.0%</td>
<td>33,804</td>
<td>17.5%</td>
</tr>
<tr>
<td>Other</td>
<td>5,638</td>
<td>NA</td>
<td>41,417</td>
<td>NA</td>
</tr>
</tbody>
</table>

For monthly visitor arrival statistics, visit the Hawai‘i Tourism Authority (HTA) website: http://hawaiitourismauthority.org/research.

<table>
<thead>
<tr>
<th>YTD Sep 2011</th>
<th>Arrivals</th>
<th>%Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOTAL</td>
<td>12,525,388</td>
<td>0.25%</td>
</tr>
<tr>
<td>Asia</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bali, Indonesia</td>
<td>155,094</td>
<td>-21.96%</td>
</tr>
<tr>
<td>China</td>
<td>2,683,700</td>
<td>-6.22%</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>930,103</td>
<td>-5.37%</td>
</tr>
<tr>
<td>Macau</td>
<td>283,224</td>
<td>9.20%</td>
</tr>
<tr>
<td>Malaysia*****</td>
<td>86,351</td>
<td>-16.45%</td>
</tr>
<tr>
<td>Singapore</td>
<td>474,821</td>
<td>23.34%</td>
</tr>
<tr>
<td>South Korea</td>
<td>2,318,089</td>
<td>4.62%</td>
</tr>
<tr>
<td>Taiwan</td>
<td>926,594</td>
<td>43.65%</td>
</tr>
<tr>
<td>Thailand</td>
<td>924,072</td>
<td>26.7%</td>
</tr>
<tr>
<td>Vietnam</td>
<td>342,567</td>
<td>7.82%</td>
</tr>
<tr>
<td>Oceania</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Australia*</td>
<td>215,489</td>
<td>-18.19%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>51,555</td>
<td>-20.55%</td>
</tr>
<tr>
<td>N.Marianas</td>
<td>111,629</td>
<td>-24.58%</td>
</tr>
</tbody>
</table>

Source: Japanese National Tourist Organization (JNTO) - Missing figures: * Aug ** Jul *** June **** May ***** Apr ****** Mar ******* Feb ******** Jan * Includes Sep figures ♦ Figures reflect total room nights
What's Happening: Oct Highlights

Japan-Hawai'i Tourism Council (JHTC) JATA and HTA hosted its annual JHTC meeting and reception on October 4, 2011 at the Happo-en venue in Tokyo. The meeting was attended by 33 executive members from Japan and Hawai'i, and included market and industry updates and discussions on how to improve Japanese visitor arrivals and experiences to Hawai'i. The JHTC was founded in 2008 by JATA and the HTA to convene top-level executives from both markets to determine challenges and solutions to improve Hawai'i's tourism industry. Since the JHTC was formed, there have been improvements made at Hawai'i's airports, customer service and other areas in airlift, marketing and the MICE market.

Maui Partner Dinner: On October 5, eight Maui marketing partners and the Maui Visitors Bureau hosted a networking dinner with five high-end female magazine media (Glow, Eclat, Story, Grazia, Men's Club, 25ans) and eight travel agents from H.I.S., JALPAK, Kintetsu, NTA, R&C Tours and TopTour. The dinner was held at a restaurant called Hiramatsu la Cave in Tokyo, where Maui partners and attendees enjoyed a cocktail reception, followed by a course dinner. Images of Maui were displayed in the background via MVB's promotional DVD, and Maui gentei omiyage (Maui exclusive presents) were presented to all attendees. Many of the participants discussed the island and their company offerings, which will help to encourage future media exposures and travel packages for the island of Maui. Mahalo to representatives from the following companies for promoting the island of Maui: Atlantis Submarines, Destination Resorts Hawaii, Grand Wailea, Hotel Wailea, Maui Visitors Bureau and the Westin Maui.

Governor’s Asia Trip: Governor Neil Abercrombie traveled to Tokyo from October 10-12 to meet with tourism industry executives. HTJ coordinated calls with six industry partners including JATA, JALPAK, JAL, JTB Group, KNT and H.I.S. Following the sales calls, a reception was held at The Westin Tokyo, attended by 50 travel industry executives. Prior to departing for Okinawa, the Governor attended a press conference with major travel trade media including Travel Journal, Travel Vision, Koku Shimbun, Travel Vision Marketing and Kanko Keizai News Corp.

Hiroshima Study Tour Seminar: In commemoration of the 30th anniversary of the relationship between the Honolulu Japanese Chamber of Commerce and Hiroshima Chamber of Commerce, a Hiroshima Study Tour Seminar was held on October 19 at the Rhiga Royal Hiroshima Hotel. The event was attended by 50 chamber of commerce members, including eight from Hawai'i, representatives from Japan Airlines, travel companies and area schools. HTJ provided a presentation about Hawai'i and its educational tour opportunities which was well-received by attendees.

Korean Airlines (KE) FAM: KE hosted its second FAM tour this year for Sapporo and Fukuoka travel agents. The group traveled to O'ahu and Maui or Hawai'i Island from October 13-18. Fourteen travel agents, one travel media and two HTJ representatives participated, experiencing: (O'ahu) accommodations at Marriott Waikiki Beach Resort & Spa, site inspection at JW Marriott Ihilani and Disney Aulani, Paradise Cove Luau, Tabi Spo Hawai'i group running program, Waikiki Trolley, Hawai'i partner workshop, (Maui) accommodations at the Grand Wailea, site inspection at The Hotel Wailea, Haleakala, I'ao Valley, Paia Town, snorkeling at Molokini Island via Pride of Maui, Shops at Wailea, (Hawai'i) accommodations by Aston Shores at Waikoloa and Sheraton Keauhou Resort, lava tour at Hawai'i Volcanoes National Park, night manta ray snorkeling, Waipio Valley Shuttle Tour, and Mountain Thunder Coffee Farm tour. Mahalo to the partners for supporting this FAM tour!
**Good News! Hawai`i Media Exposures**

**Sports, sports, sports**: Last month, there was a lot of talk about sports in Hawai‘i. *Signature*, a Diners card membership magazine which is issued 10 times a year, dedicated 18-pages to its “Active! Hawai‘i!” feature. The exposure resulted from HTJ’s spring *Tabi Spo* press tour, which included: (Maui) Haleakalā star and sunrise trek, Wailea Golf Club, horseback riding at Mendes Ranch, Old Lahaina Lū‘au, Grand Wailea Hotel, (O‘ahu) stand-up paddle surfing, *Tabi Spo* group running program, cycling, healthy & organic food, Waikiki Parc Hotel and the Wahine Half Marathon.

For the second consecutive month, *Cycle Sports* featured Hawai‘i in its October monthly issue. This month’s magazine featured “Honolulu Century Ride & Round Ride O‘ahu.” The six-page feature highlighted O‘ahu’s Honolulu Century Ride event and tour companies offering featured travel packages, Round Ride O‘ahu, a smaller cycling event, the Nu‘uanu Pali hill climb, HTJ’s Hawai‘i 50 Select campaign attractions (Hanauma Bay, O‘ahu’s North Shore, Makapu‘u Point, Waikīkī, Diamond Head), *Spo Navi Hawai‘i* and HTJ’s *Tabi Spo* Hawai‘i campaign. The magazine has circulation of 200,000 cycling enthusiasts nationwide and resulted in $116,667 in ad value.

*Chikyu no Arukikata*, a popular travel guidebook, launched a two-month website tie-up campaign with the O‘ahu Visitors Bureau (OVB). From October 20 through December 20, 2011, the website highlights two special web pages dedicated to sports travel on O‘ahu. Contents include sports travel for beginners (*HTJ*’s *Tabi Spo* weekly running program, golf lessons, Honolulu Marathon race/walk), town life (trail, bike rentals and cycling courses around Diamond Head), nature (Manoa Valley trekking, Kailua Beach, Waikele Golf Club) and sports enthusiasts (Honolulu Century Ride, Wahine Half Marathon, Turtle Bay Golf Course). The promotion includes partner tie-ups with Aston Waikiki Sunset, Hawai‘i Prince Hotel Waikiki, The Kahala Hotel & Resort, Outrigger Reef on the Beach and H.I.S. URL: http://www.arukikata.co.jp/Oahu2011/

**Did You Know?**

This section includes snippets of new travel trends and marketing insight to help you align your company’s services and offerings with Japanese consumer interests and needs.

**Educational Travel**: According to a recent article from *Travel Journal International* online, Japan’s school trip market recovered in 2010, after having plummeted 35% in 2009 during the H1N1 outbreak and economic downturn. Statistics by the Japan School Tours Bureau (JSTB) reported that 1,055 Japanese intermediate and high schools and arranged overseas school trips for 126,438 students in 2010 (+23%). This year, that number is expected to decline as a result of the March 11 natural disasters and increases in fuel surcharges.

Asia boasts 50% of the market share of educational tours, with South Korea being the most popular destination. Australia is another favored school trip destination, securing 17% of the market share for Oceania. The North America region is the third most popular school trip destination (16%), which is inclusive of the U.S. mainland, Hawai‘i and Canada. Hawai‘i has 6.5% of the total market share, reporting a 12% increase in educational travel in 2010.

Most students participating in educational tours stem from the Kanto region (23%), followed by Kinki (16%), Chubu (17%) and the Kyushu-Okinawa (14%) regions.
## Upcoming Events

**November**

- 16-21 | HTJ Hawai`i Specialists FAM (O`ahu & Hawai`i)  
- 16   | H.I.S. Niigata Hawai`i Seminar  
- 17   | JHTA Bi-Monthly Meeting (Honolulu)  

**December**

- 16   | Watabe Wedding New Product Seminar (Tokyo)  
- 17-18 | Aloha Yokohama Mele Kalikimaka (Yokohama)  

## Marketing Opportunities

Please see our upcoming marketing opportunities below. If you are interested in any of these opportunities or would like more information, please email aloha@htjapan.jp. Please note the specific marketing opportunity in the email subject line.

### Print

**Eheu Magazine:** Japan Airlines and Lighthouse Hawai`i is producing a quarterly magazine featuring interviews with prominent figures in the Hawai`i and community and Japanese nationals living in Hawai`i, Hawai`i and history and culture, hot travel topics, special luxury lifestyle features, the neighbor islands, Hawai`i and wedding styles, travel and living opportunities for seniors and JAL updates. It is distributed JAL's first class and business passengers, JAL Sakura Lounge patrons, and at major Hawai`i golf courses, luxury hotel lounges and advertiser establishments. If you are interested in advertising or providing updates for consideration, please contact Lighthouse Hawai`i at (808) 926-0022 or hi@us-lighthouse.com.

### Online Promotions

**Hawai`i Music Navi:** Studio Rim Hawai`i's Music Navi website promotes Hawai`i and entertainment and live music venues, ticket promotions and seat reservations to ensure the best service and experience for the Japanese visitor. If your hotel, restaurant or venue offers live entertainment or has an upcoming concert, don’t miss this opportunity to be included on this website.

**NEW:** In commemoration of the website's one-year anniversary, Studio Rim is offering an anniversary special campaign from August through September. Partners can purchase a website banner ad and/or offer sweepstakes giveaways. For more information on this opportunity, please email the contact below.

- Website: [www.hawaiimusicnavi.com](http://www.hawaiimusicnavi.com)
- Page Views: 10,000
- Unique Visitors: 1,500
- Contact: Reiko Rogers
- Email: reiko@studiorimhawaii.com

**Travel Vision Hawai`i Special Website:** In collaboration with Travel Vision, a major travel trade journal in Japan, HTJ launched a Hawai`i Special Website this year, which features destination information and updates. On July 1, the website launched a promotional webpage called “What’s New in Hawai`i.” If you have any new openings, products or promotions to offer Japanese visitors, please contact Travel Vision about this FREE opportunity. Please refer to the HTJ opportunity email sent on Jun 15, or email aloha@htjapan.jp for details.

**HTJ Mail Magazine (merumaga):** is emailed monthly to 24,500 consumers and 41,800 travel trade professionals in Japan. To be included, send your updates for consideration to aloha@htjapan.jp. HTJ’s merumaga is available for download on HTJ’s website at [http://www.gohawaii.jp/mail_magazine/general](http://www.gohawaii.jp/mail_magazine/general).

### Podcast

**Hawai`i Podcast:** Explore a new advertorial opportunity with Orbitune's Hawai`i Podcast Discover Aloha Corner. The 20-minute podcast is downloaded weekly by 19,000 well-traveled and tech-savvy 25-60 years old Japanese. Features include Hawai`i and culture, food, music, attractions, events and island updates.

- Podcast: Hawai`i Podcast (20-25 min)  
- Program: Discover Aloha Corner (2-4 min)  
- Cost: $500/episode (Incl: interview & website link)  
- Contact: Kaori Inagaki: k.inagaki@htjapan.jp

### Radio

**J-Wave:** Promote Hawai`i’s latest travel news and promotions from J-Wave's Waikiki Beach Walk studio.

- Program: “Colors of Hawai`i” / “Music Plus”  
- Broadcast: Mon-Thu 1:20–1:35pm (JST): Tokyo  
- Reach: 284,404 listeners/show  
- Profile: 48%-20:30 / 42%-40:50 (60% M / 40% F)  
- Deadline: Ongoing  
- Contact: Kaori Inagaki: k.inagaki@htjapan.jp

**FM North Wave:** Take advantage of this opportunity to promote your hotel, attraction, restaurant, retail outlet and other updates every week on this radio program:

- Reach: 27,775 listeners/show  
- Profile: 40% Male/60% Female ages 15-80 yrs  
- Program: “Island Breeze From Hawai`i”  
- Corner: “So Much More Hawai`i”  
- Broadcast: Every Sunday 9:00-9:15 (JST)  
- Deadline: Ongoing  
- Contact: Kaori Inagaki: k.inagaki@htjapan.jp
Thank you for reading the HTJ Newsletter. If you have any questions please refer to the list of direct contacts below.

**Hawai`i Tourism Japan**

*Press Releases, News & Updates, General Inquiries:* aloha@htjapan.jp

**Consumer Marketing**

Consumer Promotions

*Events (GW, Aloha Yokohama, JATA):* Takashi Kaneko • t.kaneko@htjapan.jp

**Public Relations**

TV: Takashi Kaneko • t.kaneko@htjapan.jp

*Magazine, Radio:* Kaori Inagaki: k.inagaki@htjapan.jp

*Newspaper & Online:* Yumiko lwase • y.iwase@htjapan.jp

**Trade Marketing**

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*Reina Okamoto: reina.okamoto@htjapan.jp*

*Trade Media, Mail Magazine, Educational Travel*

Tomoko Kenmochi • t.kenmochi@htjapan.jp

**Campaigns & Strategic Development, Reports & Newsletters**

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**Administration**

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**Hawai`i Project Coordinator**

*Marketing Partner Coordination (FAM tours, Events, Other Promotions) & Hawai`i Sales Calls*

Keiko Fujita • k.fujita@htjapan.jp

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*VP Marketing/PR:* Mitsue Varley (Honolulu) • mvarley@alinkhi.com

*VP Sales/MCI:* Toshi Saegusa (Tokyo) • tsaeusage@alinkhi.com

**2012 ATMP:** http://www.hawaiitourismauthority.org/default/assets/File/marketing/Japan%20Presentation-webinar%20101311.pdf

**2012 Opportunities:** http://www.hawaiitourismauthority.org/default/assets/File/marketing/2012%20Opportunities%20To%20Partner%20Japan.pdf

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If you would like to access past HTJ newsletters, please visit the HTA website link below and click on “Hawai`i Tourism Japan Newsletter” hyperlink in the left “Related Downloads” column:

http://www.hawaiitourismauthority.org/brand-marketing/japan/