HAWAI'I TOURISM
JAPAN

2026 Brand Marketing Plan Japan

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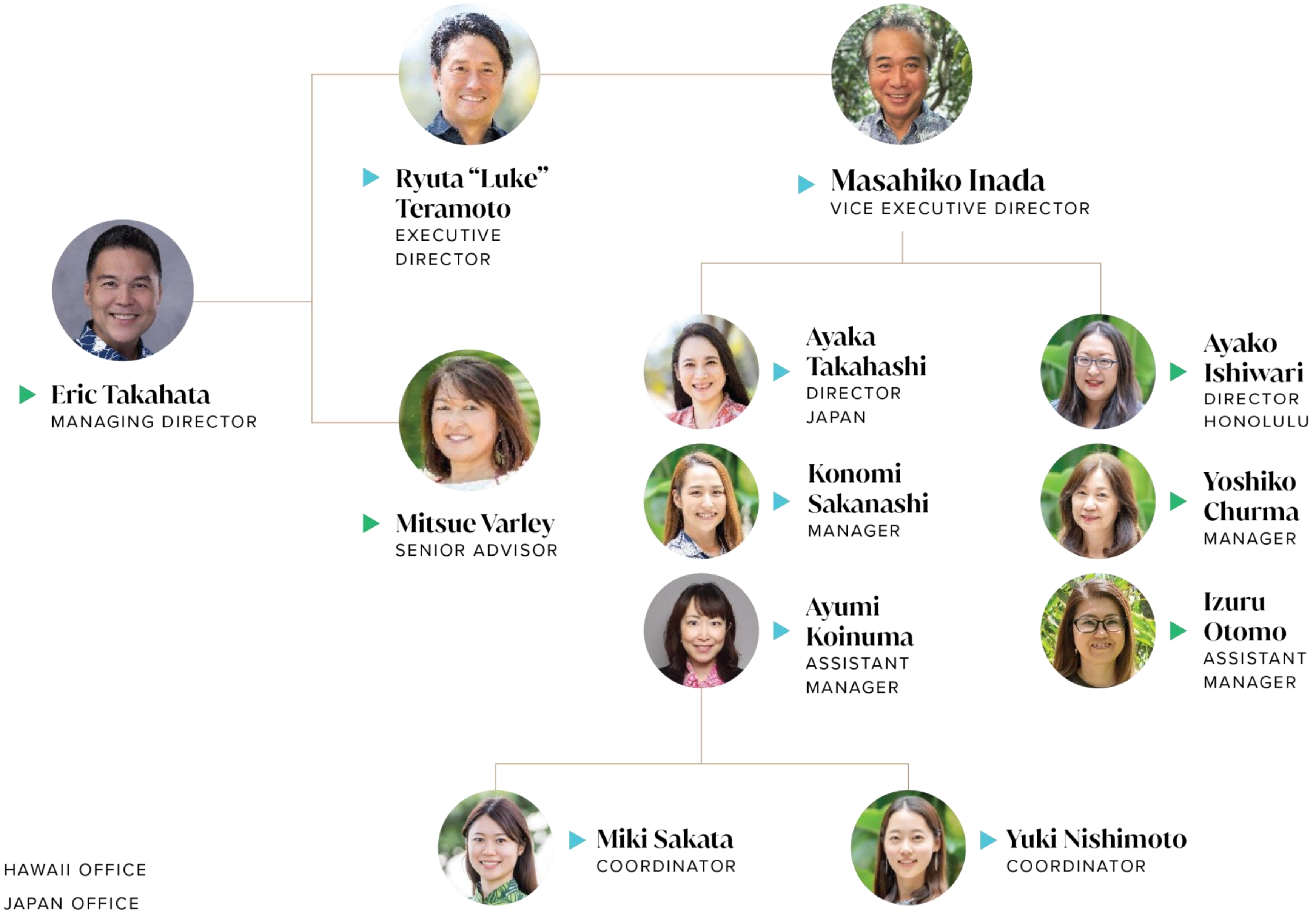

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Market Analysis

Economic & Travel

Japan GDP growth modest (~0.4% in 2026); weak yen hampers overseas travel

Outbound travel at ~70% of 2019; growth concentrated in Asia and short haul destinations with double digit YoY increases; **Hawaiʻi at 44% while per-visitor spend doubled**

Growing negative sentiment toward U.S. linked to deportations and geopolitical / economic uncertainties (tariffs, etc.)

Smaller but **higher-value traveler base** emerging

Emerging Consumer Trends

- Shift to ***experiences over goods***; wellness and emotional fulfillment drive spend
- **Social media trends** following travel destinations that offer unique opportunities
- **Seniors lead travel growth**; digital-native Gen Z also influential
- **Affluent market evolving** beyond seniors and includes the new rich
- **Sustainability and ethical travel** are now mainstream
- **Longer stays**, personalized trips and “workations” on the rise

Affluent Market and Seniors Market in Japan

Japan is a super-aged society, with approximately **one in three people aged 65 or older**—nearly double the proportion of seniors compared to the United States.

Estimated total savings of seniors aged 65 and over: **675 trillion yen ($4.5 trillion USD)**

The average per household amounts to **¥25.04 million (approximately $166,933 USD**).
The assets to be inherited are estimated at **¥40 trillion (approximately $266.7 billion USD)** annually, and this amount is expected to **increase steadily as society enters a super-aging era**.

	Japan	United States
Proportion of people aged 65 and over	**30.1%**	**16.8%**
Ratio	Japan is about **1.8 times** that of the US	
Median age	49.8 years old	38.5 years old

	Japan	United States
Cash and deposits	**51.6%**	13.5%
Stocks and investment trusts	17.4%	**50.4%**
Insurance, pensions, and fixed guarantees	28.5%	25.3%
Others (such as bonds)	2.5%	10.8%

Source: TBWA Hakuhodo

Media & Technology Trends

- Short-form video (TikTok, YouTube, Instagram) fuels inspiration
- AI and algorithm-driven recommendations replacing traditional search
- Cashless payments and mobile apps standard; AR/VR in retail and tourism expanding

Travel Industry Trends

Japan's outbound volume rebounding (~20M in 2026), nearing pre-COVID levels

Average spend surpassing ¥400,000 ($2,760); demand for premium experiences rising

HIS and JTB dominate; other wholesalers focus on groups and dynamic packages

Major wholesaler bookings to Hawai'i sluggish in first half (~70% to flat YoY); recovery projected at 110-120% YoY by Sep/year-end

***Japan completely lifted all COVID-19 travel restriction on April 29, 2023**

Competitor Landscape

Short-haul destinations: Korea, Taiwan, Hong Kong capitalize on price and convenience

Other destinations recovering air capacity faster and leveraging OTAs

Mid-haul destinations: Australia, Singapore, Thailand targeting mindful travelers

Hawaiʻi must differentiate with authenticity, cultural depth and premium experiences

Airline Trends

- Capacity to Hawaiʻi at 65–70% of 2019 levels
- Airlift expected to increase in 2026
- Direct Strong demand for premium cabins; softer economy class
- Seasonal Kona flights may resume summer 2026
- Direct bookings dominate; premium seats scarce, prices rising
- Airlines prioritizing higher yields and collaborating with destinations that contribute to building demand

Target Audience

Geographic Targets

Primary

- Kanto (Tokyo, Kanagawa, Saitama, Chiba, Ibaraki, Tochigi, Gunma)
- Kansai (Osaka, Kyoto, Hyogo, Nara, Shiga, Wakayama, Mie)
- Nagoya

Secondary

- Kyushu (Fukuoka)
- Chugoku (Hiroshima)
- Shikoku
- Tohoku
- Hokkaido (Sapporo)

Sister-Cities

- Hokkaido
- Okinawa
- Fukuoka
- Hiroshima
- Yamaguchi
- Ehime

Target Profiles

Active Seniors (60s–70s): Prosperous, time-rich, multi-gen family travelers

New Wealth Class (40s–60s): Entrepreneurs, investors, lifestyle hobbyists

Power Couples (30s–50s): Dual-income professionals, wellness-focused

Affluent Z (20s–30s): SNS-natives, high discretionary spend

Niche Audiences

Hawaiʻi Repeaters:
72% repeat rate; many view Hawaiʻi as a “second home”

Hula Market:
1.5–2M enthusiasts, cultural ambassadors

Special Interest Groups
Pickleball, other niche activities

Strategies & Tactics

Short-Term Booking Acceleration

Partnerships & campaigns

Expand co-op and launch high-impact ads to boost Hawaiʻi's appeal

Targeted marketing

Focus on affluent segments, digital CTAs, hula, educational tourism

Training

Strengthen and align education with campaign goals

Long-Term Growth

Brand management

Protect Hawaiʻi's brand strength amid resource constraints and global challenges (economy, geopolitical, U.S. sentiment)

Market growth

Promote neighbor islands; attract younger travelers and first-time visitors

MICE & partnerships

Collaborate with Meet Hawaiʻi; co-create with local partners

Content & media

Build sustainable owned media; deliver consistent, high-value content

Consumer Education and Promotions

- Hawai‘i’s brand strong in Japan; bookings lag due to costs/global conditions
- Shift to innovative messaging to address obstacles such as exchange rate, high Hawai‘i prices and negative U.S. sentiment
- Focus promotions on affluent market and repeaters; use digital targeting and partnerships to boost spending and neighbor island travel
- Growing hula community, a cultural channel for new and repeat visits

Travel Trade Training and Engagement

- Drive bookings via joint promotions with wholesalers, OTAs and airlines; expand routes and early customer acquisition
- Ongoing education through nationwide seminars, webinars and Aloha Program Satellite Offices courses ensure accurate Hawaiʻi knowledge among travel professionals
- Target educational and MCI travel through schools, government and Meet Hawaiʻi partnerships

Public Relations

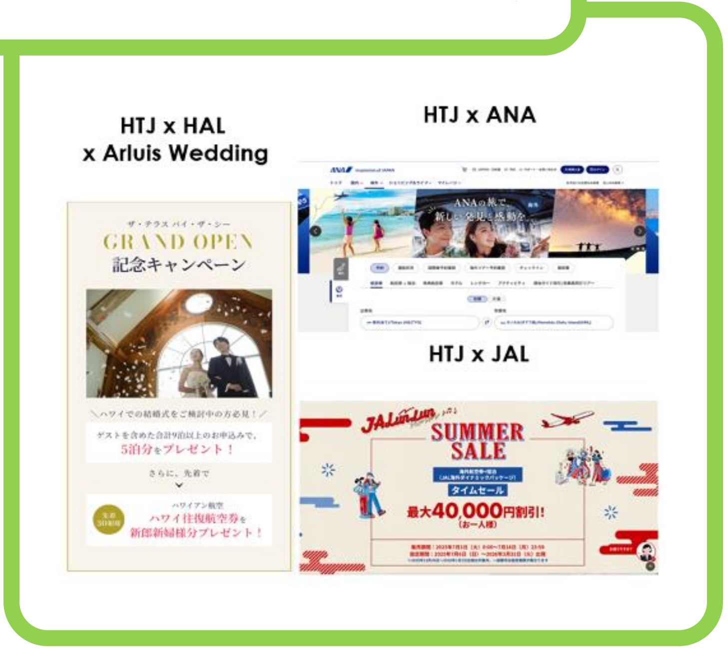
- **Proactive PR:** Pitch targeted stories and build media partnerships
- **Communications strategy:** Drive industry recovery and short-term demand by targeting affluent, neighbor island and key segments (Active Seniors, Power Couples, Repeaters, Hula, etc.)
- **Owned media** will also expand and integrate with overall media plan

Island Distribution

- Expand promotion for Kona service resumption and Maui recovery
- Develop island-specific content for repeaters, first-timers, affluent, seniors and hula markets in collaboration with Island Visitors Bureaus and local partners
- Launch FAM trips for wholesalers, OTAs and educators to strengthen product development and grow both standalone and multi-island packages

Major Programs

Recovery Co-op



Airline, OTA, and wholesaler tie-ups to stabilize supply and boost bookings


Active Senior Campaign
Because I'm old.


Time to enjoy because I'm old.
Age is just a number! I put myself first and enjoy doing what I love.
We propose a new kind of Hawai‘i trip for seniors who feel the same.

Neighbor Island Promotion

Digital-first storytelling, influencer FAMs, island-specific branding

Affluent Segment Initiatives

Tailored luxury campaigns for seniors, entrepreneurs, couples and Gen Z

Event Promotions

~100 annual Japan events (Hawai‘i EXPO, department store fairs, hula festivals)

Japan Summit 2026

B2B event for planners and wholesalers; focus on product development and outbound recovery

Education Initiatives

Aloha Program, cultural blitzes, webinars and FAMs

Educational Travel Promotion (Groups)

Ministry of Education tie-ups; high school FAMs positioning Hawaiʻi as a “treasure house of learning”


Mahalo
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