



Seattle and Washington
Tourism Promotion-Japan
**A Presentation for the
Port of Seattle**

Japanese Overseas Travel Trends

- Approximately 17 million Japanese expected to travel overseas in 2004--up 25% over 2003; Japanese travel industry goal of 20 million overseas travelers by 2007
- Market recovery well underway due to:
 - Long awaited Japanese economic recovery
 - Fewer concerns about SARS, Bird Flu, other illnesses
 - Reduced fears of terrorism/war
 - Pent up demand for travel from 3 million plus Japanese who chose not to travel during 2 years between 9/11 and Fall 2003
- Popular overseas destinations

Europe	30%
USA	23%
China	17%
Korea	13%
Thailand	8%
Oceania	6%

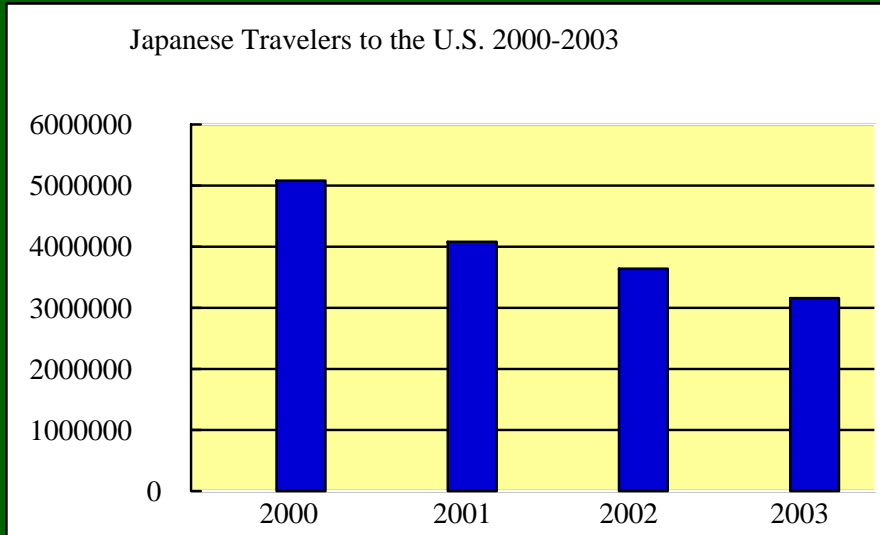
Japanese Overseas Traveler Demographics

- 55% Male; 45% Female
- 67% Leisure travelers
17% Business travelers
6% Visiting family/friends
2% Students
- Average length of stay: 5-7 days
Average spend: ¥293,000 (approximately \$2,600)
- Experienced travelers--over 58% have traveled abroad at least once

Japanese Overseas Traveler Demographics (cont'd.)

- Highly influenced by world events and popular trends, e.g. terrorism, war, disease on negative side; fashion, athletes, movies on positive side
- Popular activities:
 - Viewing nature/scenery
 - Shopping
 - Sightseeing
 - Dining
- Young single women were market leaders in 1990s. Japanese over 60 are the fastest growing market segment today

Japanese Overseas Travel to U.S.



- **13.6 million travelers in 2003-market severely affected by war fears, SARS and weak Japanese economy**
- **U.S. market recovering steadily since October 2003--Forecast to grow 7% to 3.4 million in 2004**

- **3.1 million to USA: 23% of total market**

Hawaii 1,369,000
 Guam 621,000
 Mainland 1,180,000
(39% of US market)

Japanese Visitors to Washington State

Year	2000	2001	2002	2003
Arrivals	116,600	116,600	95,700	66,000
% Change		0%	-18%	-31%

- **Largest international market for Washington State**
- **Since 2001 number of visitors declined along with total visitors to U.S. due to combined impact of fears of terrorism, wars, SARS, and weak Japanese economy**
- **2002-2003 numbers especially influenced by loss of business and student travelers**
 - Businesses did not resume overseas travel until Fall 2002; Stopped again when SARS surfaced and did not return until Fall 2003



Japanese Visitors to Washington State cont'd.

--Washington state is second to California in number of Japanese high school and college students studying in state. Parents' fears of terrorism in U.S. caused sharp drop in number of Japanese going abroad for study

- **Leisure market stable despite difficult times**

--Seattle one of only a handful of U.S. destinations promoted by Japanese travel industry since 9/11 thanks to popularity of Mariners baseball and *Living Cool, Loving Nature* theme

Seattle Washington

Japanese Visitors to Washington State cont'd.

● Sample Package Tours

Seattle Mariners/Las Vegas Tour

本場の大リーグを観て、大興奮に包まれる!

◎P シアトル大リーグ野球観戦ツアー
シアトルで大リーグのゲームを観戦するツアーです。本場メジャーの自熱したゲームをお楽しみいただけます。
料金:おとな2名とも(3~12才) 80USD/人
■旅行日:マリナーズのホームゲーム開催日
■所要時間:約6時間 ■最少乗行人員:2名

◎P シアトル大リーグVIPバックステージツアー
大リーグの裏側はいつだってどうなっているんだろう!?シアトルマリナーズの本拠地、セイフコフィールドの内部をご案内するツアーをご用意しました。通常は入れないグラウンドやバルベンへ日本人ガイドがご案内します。

VIPバックステージツアーのポイント!!
*スコアボードの電光掲示板にお客様のお名前が表示されます
*「王 満堂」サインボール
*アメリカで有名な野球選手のサインがつけられた60のステートルームのうちのひとつ「王 満堂」ステートルームにご案内します。(内部への立ち入りはできません。)
*ブルペン、ファウルゾーン、ダグアウト(ベンチ)、プレスボックス(記者席)を見学します

コース (3~12才) 所要時間

A:遠征なし	20:00	おとな2名とも(3~12才)294USD/人	09:30-11:30
B:遠征付き	20:00	おとな2名とも(3~12才)340USD/人	08:30-12:30

■旅行日:マイゲーム開催日(土・日曜日、デイゲーム開催日を除く)
※旅行日は6月9日、10日、11日、12日のいずれかです。

■最少乗行人員:各コースNo.ごとに2名
※旅行日当日、1日1ツアー実施。観戦場所の変更はできません。
■旅行日:マリナーズの試合開催日の定数に2名、少なくとも1名以上が必須です。観戦は必ず2名以上で行われます。
■旅行日当日は前夜に申し込んでいただいた乗客は必ず乗客です。
■乗客は乗客の自己責任で旅行に参加してください。お申し込みの際は必ずお読みください。

●主催:Kauai Tours International (現地法人)



マイレージ シアトル5/6/7 ラスベガス6/7/8

出発地:東京 (東京以外からのご参加の場合(伊丹発着))、オーストラリア

出発地	シアトル		ラスベガス	
	マイレージ	マイル	マイレージ	マイル
東京	111	111	456	456
オーストラリア	222	222	567	567

日程 5/6/7 シアトル 5/6/7 ラスベガス

111 15:00-18:00 乗車(伊丹発着)シアトル(伊丹発着)シアトル市内観光

222 08:00 伊丹発着 伊丹発着 伊丹発着

345 伊丹発着 伊丹発着 伊丹発着

456 伊丹発着 伊丹発着 伊丹発着

567 伊丹発着 伊丹発着 伊丹発着

2004年4-5月の毎日出発(7-9月も毎日出発) 単位:円

コース	日	コースNo.	毎日の旅行代金カレンダー 8											旅行代金									
			A	B	C	D	E	G	H	J	K	L											
Bグレード	5	C3000	104,000	104,000	104,000	119,000	119,000	119,000	119,000	119,000	119,000	119,000	119,000	119,000	119,000	119,000	119,000	119,000	119,000	119,000	3,600	36,000	
	6	C3001	113,000	113,000	113,000	128,000	128,000	128,000	128,000	128,000	128,000	128,000	128,000	128,000	128,000	128,000	128,000	128,000	128,000	128,000	3,600	40,000	
	7	C3002	122,000	122,000	122,000	137,000	137,000	137,000	137,000	137,000	137,000	137,000	137,000	137,000	137,000	137,000	137,000	137,000	137,000	137,000	3,600	50,000	
Aグレード	5	C3003	116,000	116,000	116,000	131,000	131,000	131,000	131,000	131,000	131,000	131,000	131,000	131,000	131,000	131,000	131,000	131,000	131,000	131,000	3,600	47,000	2,500
	6	C3004	129,000	129,000	129,000	144,000	144,000	144,000	144,000	144,000	144,000	144,000	144,000	144,000	144,000	144,000	144,000	144,000	144,000	144,000	3,600	56,000	3,500

西海岸
西日本ツアーパック

Japanese Visitors to Washington State cont'd.

● Sample Package Tours

Living Cool Seattle Tour



SEATTLE Map

シアトルセンター
シアトル・マゼラン

1 セーフコフィールド
2 ダウンタウン
3 ファーマーズマーケット
4 シアトル美術館
5 セーフコフィールド

シアトルでは
シーフードが絶品!

シアトルでおいしいものと言えばシーフード。スモークサーモンの産地も有る。ピアスR。クラブ周辺には新鮮なシーフードレストランが並び、特にクラムチャウダーは美味。

Japanese Visitors to Washington State cont'd.

- Average leisure traveler stay: 5 nights
- Average leisure traveler spend: \$112/day
- Major target markets for Partnership
 - Baseball fans: all ages; young; families
 - Shopping/dining/relaxation: women in 30s
 - Nature/outdoors: seniors; families
 - Cruise: seniors
 - Education (short and long-term)/experiential: young; seniors



Seattle and Washington Tourism Office Major Programs 2001-2004

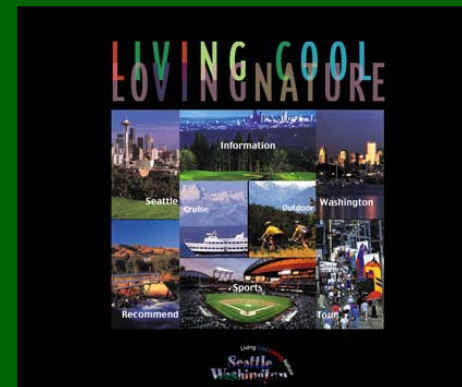
Branding

- Establish Identity: *Living Cool, Loving Nature*

Travel Concept Guide
30,000 distributed



Japanese-language Website
Average 5,000 Visitors/Month



Result: Logo consistently used by tour operators and media to promote Seattle and Washington. Themes of “cool” and “nature” basis for all product development and promotion



Seattle and Washington Tourism Office Major Programs 2001-2004

Travel Industry Marketing

- United Airlines Seminar, Northwest Airlines Fam Tours: Educated approximately 130 travel agents & tour operators over 3 years
- Tour Package Development: More than 45 package tours on market each year --up from none in early 2001
- Trade Show Participation: Active America; Pow Wow, SeeAmerica Week
- Tourism Missions: One per year directly reaching over 450 tour operators and media
- Regular inquiries: 1,113 to office over 3 years

Result: New package tours, increased market visibility & awareness

Seattle and Washington Tourism Office Major Programs 2001-2004



Publicity

- **Media visits and fam tours:** Over 100 journalists hosted on themed fam tours organized with airlines (featuring Seattle overall, cruise, winter fun) or individually to pursue stories; More than 150 articles over 3 years
- **Travel Guidebooks:** Advertising and editorial support for 9 guidebooks reaching over 5 million readers
- **Regular media inquiries:** 372 Inquiries over 3 years

Result: Over \$13 million in media coverage over 3 years reaching over 15 million readers

Seattle and Washington Tourism Office Major Programs 2001-2004



Campaigns

- “Living Cool, Loving Nature”: Sponsored by Partnership; 8 free trips
- Eddie Bauer: 3 separate campaigns promoted directly to over 500,000 Eddie Bauer customers; 93,000 participants for 9 free trips; \$75,000 in direct exposure
- *Brother Bear*: Movie and Danone tie-up; over 44,000 participants in Danone campaign for 1 free trip; direct appeal to over 5,000 moviegoers; *Brother Bear* branded package tours; \$100,000 in direct exposure
- Consumer products campaigns: More than 10 major campaigns (Northwest Airlines, Starbucks, Tully’s, Prudential, Radio Nippon, Pepsi, Mastercard, Morinaga, AM/PM, Shiseido) reaching millions of Japanese consumers

Result: Over \$1 million in exposure for Seattle and Washington



Economic Impact of Japanese Tourism

- \$465,000 spent over 3 years by Partnership
- Approximately 300,000 visitors spending over \$168 million in Washington State
- Over \$14 million in media and promotional coverage

Trends & Future Direction

- Increased focus on “Loving Nature” side of state--fly/drive
- Continued emphasis on “Living Cool” side of Seattle & Baseball Plus
- Develop extended stay options for Japanese of all ages (study, health/medical, relaxation, city living experience, sports, cultural)
- Expand promotion for cruise, cruise & stay, cruise & drive--
-Over 2,000 cruise passengers expected in Summer 2004