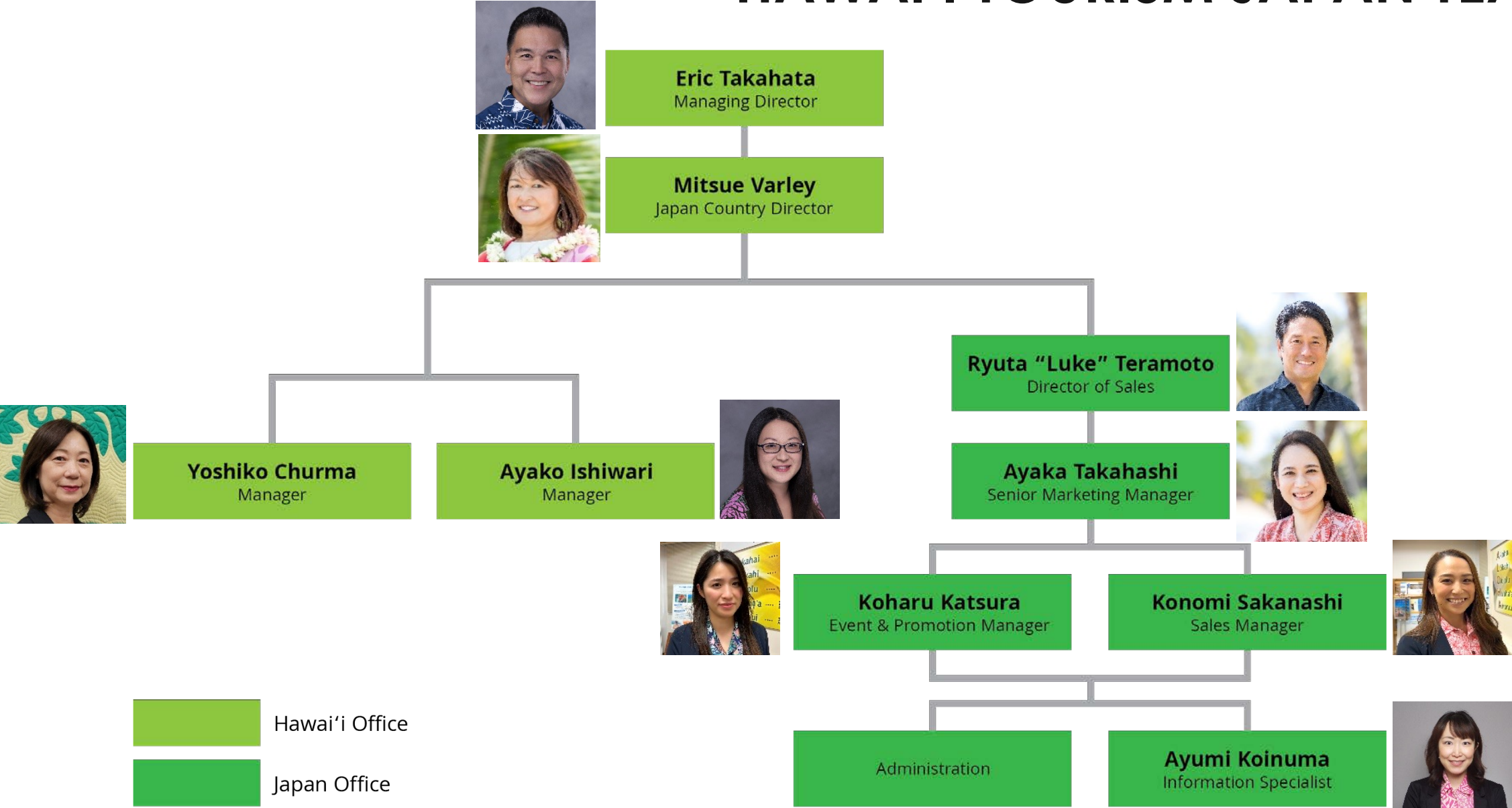




2024 Brand Marketing Plan

Eric Takahata
Managing Director

HAWAI'I TOURISM JAPAN TEAM



MARKET SITUATION





GENERAL ECONOMY

- Japan's economic output grew by an annualized 6% in Q2 (third consecutive quarter expansion and strongest growth since last quarter of 2020)
- Rise in exports with a flood of tourists into Japan
- Weak yen and high inflation slows domestic spending
- Continued recovery expected



OUTBOUND TRAVEL

- Hypersensitive to natural disasters and major crises, HTJ promptly communicates the latest updates on Maui across the Japan market
- Amidst the wildfire crisis, Japanese businesses and residents were inspired to help, resulting in the creation of a platform that accepts gifts in yen, further reflecting Japan's commitment to Hawai'i's future
- Japanese government continues to focus on promotions to drive outbound and overseas travels (e.g. JATA's Passport Campaign)
- Hawai'i remains top desired destination of choice



AIR SEAT SYNOPSIS

- Hawai'i routes currently operated by ANA, JAL, HA, and ZIPAIR
- Airline seat supply recovered to over 60% of 2019 level
- Man power struggles continue for Japan as well as globally
- 2024 expected to recover closer to pre-COVID level

COMPETITIVE LANDSCAPE



Short Haul Destinations

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



Long Haul Destinations

- Europe
- Canada
- Australia

Aggressive campaigns by competing destinations ramp up to capture highly sought after Japanese market share



TARGET AUDIENCE

TARGET AUDIENCE



**Affluent
Traveler**



**Romantic
Couples**



**Experience
Seekers**



**Ethical
Younger
Generation**



**Multi
Generation
Family**

Mindful travelers with annual household incomes of \$75,000+ and total assets worth over \$1 million will be targeted in regions with direct flight access to Hawai'i

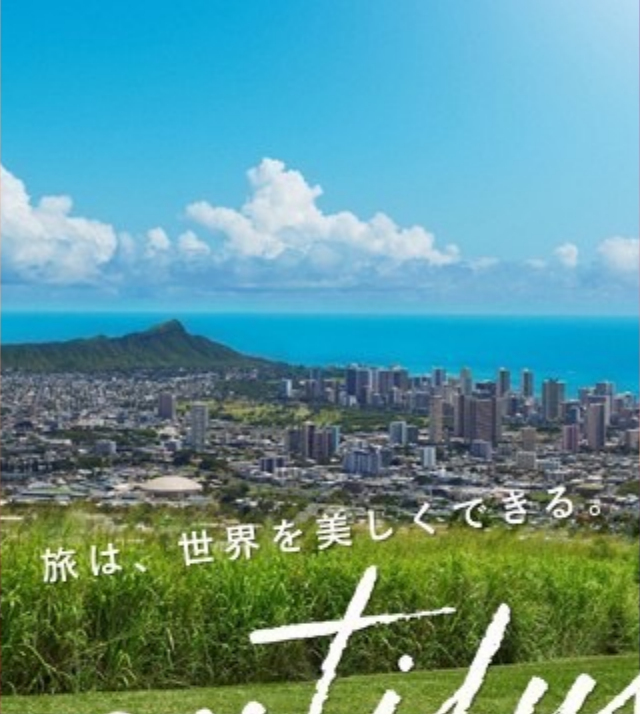
An aerial photograph of a coastal highway built on a steep, green cliffside. The road curves along the edge of the cliff, overlooking the ocean. The water is a vibrant blue with white foam from the waves crashing against the rocky shore. The sky is clear and bright. The overall scene is one of natural beauty and engineering.

CORE BRANDING MESSAGE



CORE BRAND MESSAGE BEAUTIFUL HAWAI'I

- Pivot messaging to focus on driving bookings
- Inspire a deep appreciation of Hawai'i's natural beauty, historical significance, cultural depth and local community under the Mālama Hawai'i initiative
- **“Beautiful Hawai'i, travel can make the world beautiful”** campaign is designed to change one's outlook on life through travel
- HTJ aims to inspire the importance of travel in discovering the true meaning of beauty by connecting visitors with each of the Hawaiian islands at a deeper and more emotional level



旅は、世界を美しくできる。

Beautiful Hawaii



A close-up photograph of a person's hands painting a wooden stick. The left hand holds the stick steady while the right hand uses a brush to apply dark blue paint. The background is a blurred patterned fabric. A white horizontal line is positioned below the word 'STRATEGIES'.

STRATEGIES



CONSUMER & TRADE

- Pursue a targeted segmentation approach focusing on mindful and high-value travelers in specific geographic regions to raise the quality of visitors to our state
- Implement strategy focused on stimulating demand during off-season periods with top wholesalers
- Collaborate with government organizations and major airlines to accelerate demand and restore suspended flights to Hawai'i



PUBLIC RELATIONS

- Share timely and accurate updates on Maui and other travel related information with industry partners and on all platforms highlighting the reopening of West Maui on October 8
- Ramp up interest to travel to the Hawaiian islands with a focus on island branding through owned and earned media channels
- Showcase Hawai'i's brand appeal over competing destinations



MAJOR PROGRAMS

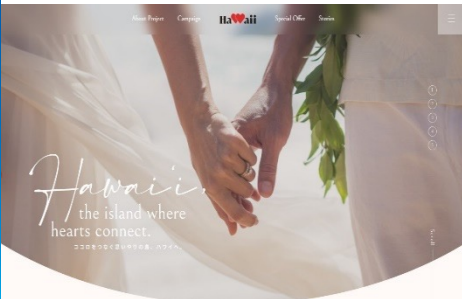


JAPAN MARKET RECOVERY INITIATIVES

- Accelerate Air Access Program
 - Co-op program with airlines to maximize B to C approach
 - ANA A380, JAL KOA, HA Fukuoka & Sapporo
- Industry Partner Program
 - Joint B to C recovery campaign
 - Expedia, HGV including AMEX, JCB, etc.

BEAUTIFUL HAWAI'I/HIGH-VALUE MARKET

- Beautiful Hawai'i campaign to run on train ads, taxi ads, inflight video and cinema ads
- Romance and golf promotions to target high-value visitor segment



TRAVEL TRADE INITIATIVES

Japan Summit and Japan Mission

- Reinforce relationships between suppliers and travel agents, create opportunities to experience the islands to increase booking pace, enhance product development



DIRECT CONSUMER EVENTS

Hawai'i EXPO and JATA Tourism EXPO

- Accelerate summer to fall booking, increase engagement with consumer, enhance island branding, expand awareness of made in Hawai'i products





MĀLAMA MAUI



MĀLAMA MAUI

- Distribute HTA produced content
- Enhance Maui contents on owned media and conduct SNS campaigns to boost organic growth and reach
- Collaborate with media to increase feature on Maui stories
- Designate a special “Mālama Maui” section at events and distribute Maui messaging to event promoters in Japan to garner support at direct consumer events

PARTNERSHIP OPPORTUNITIES



PARTNERSHIP OPPORTUNITIES

Opportunities	Date	Point of Contact
Japan Summit	April	sales@htjapan.jp
Hawaii EXPO	June	hawaiiexpo@htjapan.jp
Tourism EXPO Japan	September	sales@htjapan.jp
Japan Mission	November	sales@htjapan.jp
FAM Tour	Throughout the year	sales@htjapan.jp
Press Tour	Throughout the year	prhtj@htjapan.jp



2024 BMP BUDGET

2024 BMP BUDGET

	Budget
Consumer Direct	\$2,532,000
Public Relations	\$988,000
Travel Trade	\$1,550,000
Administrative	\$1,430,000
Total	\$6,500,000



INCREMENTAL FUNDING REQUEST FOR JAPAN MARKET RECOVERY



JAPAN MARKET RECOVERY

- Steady but slower than expected market recovery due to uncontrollable factors (40% of 2019)
 - JPY/USD exchange rate
 - U.S. inflation
 - High air fuel surcharges
- Competitive destination implementing aggressive initiatives and resources to gain Japanese traveler market share
- Fight to maintain presence and market share as well as fend off competing destinations
- Pivot from Mālama to messaging that inspires and drives bookings to Hawai'i

COMPETITIVE DESTINATION'S INITIATIVES

Hong Kong

500,000 airline tickets
HK\$100 cash voucher



Taiwan

\$150 cash back campaign
Free half day tour



Thailand

20% off tour, 7% off hotel,
3% off airlines



Guam

\$20 off coupon to 5,000
consumers



Marianas

Monthly gift campaign
Up to 70% off on hotel, activity,
restaurant, etc.



NEW CAMPAIGN “YAPPARI HAWAI‘I”
(IT’S GOTTA BE HAWAI‘I!)

旅、始めるなら。
やっぱりハワイ



みんなと行くなら
やっぱりハワイ

とっておきなら
やっぱりハワイ

間違いないね！
やっぱりハワイ

JAPAN MARKET RECOVERY INITIATIVES

Advertising / Digital Marketing



Media tie-up



Industry Partner Collaboration



INCREMENTAL BUDGET & TARGET

Budget Request: \$2,500,000

Target visitor arrivals: Over 1 million

	Budget
Advertising	\$1,000,000
Media tie-ups	\$500,000
Digital marketing	\$250,000
Industry Partner Collaboration	\$750,000
Total	\$2,500,000

MAHALO!

HAWAII TOURISM
JAPAN

