

# HEALING IN PARADISE

*A Strategy for Cultivating Health & Wellness Tourism in Hawai'i*

Business Plan Report

Presented to the  
Hawaii Tourism Authority  
May 31, 2004



GLOBAL ADVISORY SERVICES

**A division of Kokua Integrative Healthcare Solutions, Inc.**  
*Bringing together the best in health, wellness and Hawaii tourism*

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## **I. Executive Summary**

### **Mission Statement**

The mission of *Healing in Paradise: A Strategy for Cultivating Health and Wellness Tourism in Hawaii* is to bring the State to the forefront of this rapidly emerging industry, while focusing on unique aspects of the host culture and this island community in an authentic, respectful manner that is also consistent with the state's economic goals.

### **Vision**

Hawaii will be broadly recognized as the premier destination for visitors whose primary intention is to enjoy health and wellness experiences. Hawaii's unique environment and lifestyle, which already supports the greatest longevity in the country, and led Honolulu to be acknowledged as the healthiest city in the United States, will draw health seekers from around the world. This dynamic new form of tourism can enhance and diversify Hawaii's tourism industry, improve the health of the state's visitors, and benefit the people of Hawaii in myriad ways.

Hawaii is poised to be the global leader in health and wellness tourism. The *mana* of this magical place makes Hawaii an ideal place for healing. New paths to health and healing are exactly what millions of potential Hawaii visitors are searching for at home. While they search for better health, Hawaii's health practitioners, entrepreneurs and institutions already provide excellence in this area. By connecting these potential customers with Hawaii's practitioners and other health and wellness assets, Hawaii can enjoy a first mover advantage

### **Benefits to the People of Hawaii**

The success of the current effort will be measured by the ability to achieve the following benefits:

1. **Enhanced quality in the visitor mix supporting diversification of the tourism product and sustainability** - Hawaii will increasingly attract visitors arriving with greater resources and a growing authentic respect for the land and its people.
2. **Job creation and economic benefit** – Health and Wellness Tourism will create multiple jobs in a broad range of areas including a high proportion of quality, professional positions.

3. **Improved health and wellness for Kamaaina** – It is essential that the development of infrastructure for visitors to experience health and wellness result in increased access to health services and education for residents of Hawaii.
4. **Preservation of the host culture** – At its foundation and in each aspect of the project, representatives of the host culture need to be part of the conversation. This effort must be designed to protect, respect, support and preserve the host culture.
5. **Strength from diversity** – Great synergy will be enjoyed by respecting and leveraging the profound diversity within Hawaii. Every island has existing health and wellness initiatives that express each island’s unique attributes. This blending of all islands creates a more broad and interesting visitor experience.

## **Company Overview**

At the end of 2002, The Hawaii Tourism Authority (“HTA”) contacted Kokua Integrative Healthcare Solutions Inc, Division of Global Advisory Services (“Kokua”) and asked the firm to develop a comprehensive state plan and strategy to cultivate a health and wellness visitor industry in Hawaii.

Kokua’s Division of Global Advisory Services was founded by Ira Zunin, M.D., M.P.H., M.B.A. It is based at the Kokua headquarters at Manakai O Malama on the sixth floor of the Honolulu Club Building together with its sister Division of Practice Management. Also housed at Manakai O Malama is the Hawaii State Consortium for Integrative Healthcare, a non-profit entity dedicated to education and research, and the Manakai O Malama Integrative Healthcare Group and Rehabilitation Center.

The Health and Wellness managerial team includes Elizabeth Churchill, who brings extensive experience in tourism sales and marketing, Erik Kloninger, M.B.A. with a background in hospitality industry consulting at PricewaterhouseCoopers and Mike Gardner, M.B.A. formerly at Anderson Consulting.

## **Project Overview**

Under an initial contract during the first part of 2003, Kokua was tasked to explore the specific potential of the health and wellness market, to develop and test an initial vision and strategy.

The response to a series of presentations to key stakeholders from HTA, DBEDT, The University of Hawaii and key individuals from health and wellness as well as travel and tourism resulted in a decision by HTA to move onto this second phase of the project.

The primary objectives during Phase II were to move toward a statewide consensus on optimal strategies for success in the endeavor and to deliver a strategic business plan.

In order to complete this task, six working groups each covering different aspects of the plan met a total of eighteen times over a two-month period.

**Working Groups :**

- Product Inventory
- Networking and Planning
- Business Plan
- Business Development and Incubator
- Education and Certification
- Marketing

The project enjoyed extensive cooperation and collaboration with selected agents of change from throughout the government, healthcare, tourism, hotel and academic sectors. Members of the host culture were an integral part of the planning process. Preliminary findings were then presented at a statewide workshop at the end of April. It is on the basis of Phase I efforts, Phase II working groups, the comprehensive planning workshop, secondary research, individual meetings in the field, and internal strategy sessions by the Kokua team that this document was crafted.

***Core Strategies and Recommendations***

**Product and Service Inventory**

The current effort is differentiated from prior attempts at health and wellness tourism during the past thirty years in part on the basis of the broad range of inventory items that are included in the definition of health and wellness tourism. The following major headings were proposed at the end of Phase I:

- Modern Medicine
- Integrative Healthcare
- Eastern Arts
- Host Culture
- Edutourism
- Ecotourism
- Agritourism
- Sports & Fitness
- Spas, Retreats, B&B's

After extensive discussion during Phase II, consensus was to lead with an experience-based classification system based on intentions visitors have when they plan to visit Hawaii:

- Relaxation, Rejuvenation & Retreat
- Inner Pilgrimage
- Fitness & Sports
- Lifestyle Modification & Education
- Travel for the Purpose of Serving Others
- Complementary and Alternative Medicine
- Nature as Healer
- Modern Medicine

Despite the fact there are several excellent “listings” of products and services, there was a consensus that a web-based tool with a comprehensive database needs to be developed to capture and catalogue multiple attributes associated with a given product or service. The web-based tool will enable optimal inventory management and serve as the *virtual* centerpiece for the business development and incubation functions. It provides two additional essential functions; to inform brand development and a phased marketing rollout.

## **Marketing and Brand Development**

On the basis of research done to date, there is little question that substantial consumer demand exists for health and wellness tourism. On May 28, 2004 the National Institute of Health, Center for Disease Control announced that a survey of 31,000 U.S. households found that 36% are using integrative and complementary health services. When spirituality is included as a criterion, the number jumps to 62%. The majority of those services are encompassed by the inventory of services available in Hawaii.

What is also clear from competitive destination research is that Hawaii still has the potential to leverage the benefits of a first-mover advantage. Only the government of Thailand is investing substantial resources to occupy this developing niche. The majority of other destinations focus on destination spas, natural waters or other narrow areas of this tourism sub-sector. The consensus is also that the window of opportunity to get out of the gates as a first mover is unlikely to last longer than another eighteen months.

In order to further refine the current understanding of known, existing consumer demand, additional primary and secondary customer research and destination research will be performed. Upon completion, a brand statement will be developed and presented to stakeholders for review and comment. With this input, final revisions to the brand statement will be made. Then, drawing from inventory research efforts, signature elements will be proposed for marketing and advertising to initiate a phased rollout.

## **Business Development and Incubation**

Prior efforts at branding Hawaii as the Wellness State have focused on selecting narrow elements of the existing inventory and attempting to go straight to market. This is highly inadvisable for two reasons: First, health and wellness tourism is a nascent field. The primary challenge is not to compete for market share, as would be the case for example, the golf or bridal markets. Instead, the key challenge is to cultivate the industry to be marketed with a comprehensive plan for business development and incubation. Second, because a substantial portion of the products and services are within the scope of healthcare, attention must be paid to risk management and quality assurance.

There is strong consensus that a bricks and mortar business development center is essential to ensure a robust range of sustainable, competitive, high quality health and wellness products and services. In addition to a central bricks and mortar facility in a major population center, satellite facilities and pilot projects are envisioned. As noted above, in parallel a virtual web-based tool for business development is essential.

During the working group process, several key stakeholders expressed a strong interest in exploring the potential for partnership in a business development center. Phase III calls for a planning grant that would result in a comprehensive business plan addressing funding sources, physical plant, academic partnerships, professional association partnerships, a comprehensive menu of business services to be offered and a viable business model.

## **Education and Certification**

Education is the foundation for any process that would enable certain *kamaaina* vendors to be distinguished as particularly dedicated to authentic, quality services to health and wellness visitors. Among the many educational components proposed, two consistently received the highest priority: host culture training and hospitality training. The former ensures a consistent, authentic relationship between the host culture, the *kamaaina* vendor and the visitor. The later supports new businesses and helps those healthcare providers, who have never served a visitor, to understand the hospitality industry. Several key potential partners are now identified to develop an educational component during Phase III.

## **Phased Plan – Next Steps**

Kokua has employed a multi-phased approach. This report represents the culmination of the second phase of the process. Briefly, the phases can be described as follows:

<b>Phase I</b>	<b>Develop Vision and Strategy</b>
<b>Phase II</b>	<b>Strategy, Business Plan and Statewide Consensus</b>
<b>Phase III</b>	<b>Launch</b>
<b>Phase IV</b>	<b>Implementation</b>
<b>Phase V</b>	<b>Ongoing Operations</b>

:

## **II. Introduction**

### ***Company Overview***

Kokua Integrative Healthcare Solutions, Inc. and its Global Advisory Services division (“Kokua”) was founded by Ira Zunin, M.D. M.P.H., M.B.A. to promote integrative health products and services in Hawaii and internationally. Kokua is a Hawaii-based healthcare consulting firm, providing healthcare organizations worldwide with a range of client-focused consulting services, including:

- Clinical modeling and benchmarking
- Business development and deal execution
- Strategic planning and operations consulting
- Industry research, analysis, and forecasting
- Staff development

Kokua works with a broad range of clients from healthcare providers and payers, to government organizations, to product developers, manufacturers, and distributors. For this project, the Kokua team includes Senior Project Managers Elizabeth Churchill and Erik Kloninger, two individuals with substantial experience in the fields of tourism marketing, sales and consulting. Michael Gardner of Kokua also worked on the project. The resumes of all Kokua project team members can be found in the Appendix.

The qualifications and experience of the project team members makes Kokua uniquely qualified to formulate a plan to develop Hawaii’s health and wellness tourism industry.

### ***Background***

The Hawaii Tourism Authority (“HTA”) retained Kokua to develop an overall state plan and strategy to develop a health and wellness tourism industry in Hawaii. Kokua was tasked with exploring the potential of the health and wellness market and report its findings to the HTA. To achieve this, people from a variety of different fields were brought together to create a vision and road map for developing Hawaii as a health and wellness destination. Participants included but were not limited to representatives of the following:

- Academia
- Complementary and Alternative Medicine
- Eco-tourism
- Edu-tourism
- Government

- Host Culture
- Hotels
- Modern medicine
- Spas
- Tourism PR and Marketing
- Sports & Fitness

The approach has been to build consensus among a broad group of stakeholders. To achieve this, Kokua invited leaders representing each of the above fields to participate in a series of working groups organized around key areas. The six working groups were:

- Product Inventory
- Network and Planning
- Incubator and Employment
- Certification
- Business Plan
- Marketing

The working groups convened to discuss each person's vision for health and wellness tourism in Hawaii and issues relating to each of the specific areas. The culmination of the working group process was a full-day workshop held at the Hawaii Convention Center on April 29, 2004 that brought together all of the working group committee members, as well as other individuals from government, tourism, healthcare and the public.

Several major differences distinguish this health and wellness tourism initiative from earlier efforts:

1. The broad scope of the product inventory included.
2. Creation of a new sub-sector of tourism through a product development process.
3. The commitment to include representatives of the host culture in every phase of the project.

### **Broad Inventory Scope**

Hawaii's health and wellness tourism product should encompass a broad scope of experiences and modalities. Rather than narrowly focusing on modern medicine or spa-type experiences, Hawaii's health and wellness tourism product should reflect all of the health and wellness assets the state has to offer. While this includes modern medicine and spa experiences, it also includes other healing techniques and wellness treatments, as well as Hawaii's natural environment and host culture.

## **Product Development**

Time and resources should be devoted to developing a high-quality health and wellness tourism product that encompasses many different experiences and healing modalities. The goal is to create a product that is safe, ethical and credible. One reason for this is to strive for positive customer experiences, and not jeopardize Hawaii's high visitor satisfaction ratings. Another reason is to help manage risk.

Because the product deals with people's health, more attention must be paid to the quality of the product than is the case with other segments of Hawaii's visitor market that are marketed to the world, such as the bridal market or the golf market.

Certification of providers is one way that the working groups looked at as a means for delivering a safe, ethical and credible product. Various models for vetting providers were discussed in the Education & Certification working group.

Another element of product development is incubation, or business development. The function of the business development or incubation service would be to assist health and wellness providers as they target the visitor market. In some cases, the services provided would be business incubator services for start-ups and individuals not currently providing services for fees. In other cases, business development services would be provided to existing businesses or individuals who are looking to expand their business into the visitor market.

## **Host Culture**

Hawaii's health and wellness tourism product should include the host culture in a meaningful way. Representatives of the host culture were invited to participate in the working groups. Some chose to participate in the process from the start, while others took a 'wait and see' approach.

The feeling that Hawaii's tourism industry has exploited Hawaii's host culture was expressed in the working group sessions. Some believe the host culture has been used as window dressing, with the culture's imagery used to market Hawaii to the world. Authentic Hawaiian healing practices should be an integral part of the state's health and wellness tourism product. Representatives of the host culture have been included from the beginning in the planning process, and it is hoped that they will continue to participate as the project moves toward implementation.

Meaningful participation by the host culture can benefit all. The health and wellness tourism initiative can create new economic opportunities for Hawaiian healers. The host culture differentiates Hawaii from competing destinations, which strengthens the product. Lastly, the health and wellness tourism initiative is an opportunity to develop a different

approach for Hawaii tourism, based on a relationship that protects, preserves and supports the host culture.

### ***Project Overview Timeline***

Kokua has employed a multi-phased approach. This report represents the culmination of the second phase of the process. Briefly, the phases can be described as follows:

#### **Phase I (April – May, 2003):**

- **Develop Vision and Strategy**
  - Tested the vision for Hawaii’s health and wellness tourism industry
  - Proposed the strategy to realize the vision

#### **Phase II (January – May, 2004):**

- **Strategy, Business Plan and Statewide Consensus**
  - Develop the strategy
  - Deliver the business plan
  - Built broad-based consensus for the vision and strategy

#### **Phase III (Proposed July – December, 2004):**

- **Launch**
  - Consumer market research
  - Brand development
  - Business Development Center planning
  - Inventory refinement
  - Web-based tool development
  - Evaluate certification models
  - Identify special event and alliance partners

#### **Phase IV (Proposed January – June, 2005):**

- **Implementation**
  - Marketing roll-out
  - Pilot business development projects
  - Establish Business Development Center
  - Finalize educational curriculum
  - Develop special event tie-ins

**Phase V (Proposed June, 2005):**

- **Ongoing Operations**
  - Monitor ongoing research and customer feedback
  - Refine brand statement and consult with marketing and advertising vendors
  - Operate business development center
  - Oversee provider education/certification
  - Manage alliances and sales partnerships
  - Manage relationships with special events

***Mission Statement***

“Kokua’s mission is to cultivate strategies for health and wellness tourism that bring Hawaii to the forefront of this emerging industry, while focusing on unique aspects of the host culture and this island community in an authentic, respectful manner that is also consistent with the state’s economic goals.”

***Vision for Hawaii Health and Wellness Tourism***

Hawaii should be the world leader in the field of health and wellness tourism. The *mana* of this magical place makes Hawaii a place for healing. New paths to health and healing are exactly what millions of potential Hawaii visitors are searching for at home. While they search for better health, Hawaii’s health practitioners, entrepreneurs and institutions are already providing the best-of-the-best of these services. By connecting these potential customers with Hawaii’s practitioners and other health and wellness assets, we can grow this segment of the market to the benefit of all involved.

Hawaii can be recognized everywhere as the destination for healing and wellness. People will visit here for the purpose of improving their health or their life. Hawaii’s unique environment and lifestyle, which already support the greatest longevity in the country, and led Honolulu to be acknowledged as the healthiest city in the United States, will draw health seekers from around the world. This dynamic new form of tourism can enhance and diversify Hawaii’s tourism industry, improve the health of the state’s visitors, and finally, benefit the people of Hawaii in the form of a better economy and access to even finer health services.

## Working Group Input

The working group members were asked to share their vision for Hawaii's health and wellness tourism industry. Their input on a vision for health and wellness tourism is presented below:

- The *mana* of this magic place makes Hawai'i a place for healing.
- Creation of an entity that creates linkages between visitors and practitioners.
- A new model for tourism, involving the place, guest and host. Currently, someone else is doing the inviting (marketing) when it is properly the *kuleana* of the host to do the inviting.
- A sub sector of the tourism industry that adds value to the guest experience.
- Not just a niche market but also a core value that permeates all aspects of the visitor experience. This includes eco-friendly hotels, healthy cuisine, sustainable environmental practices, etc.
- It's not just about visitors but embraces the resident population as well. *Kama'aina* population can also access the system and benefit from it. Also, there is an economic benefit to local residents as well.
- The wellness revolution is the next major economic boon in the post-industrial, post-information age. As such, development of health and wellness tourism in Hawai'i has the potential to be a major economic stimulus to Hawaii's economy.
- Two major components:
  - The establishments of major health and wellness retreats and conferences that draw visitors to Hawai'i.
  - The development of holistic healing centers that offer a variety of healing modalities on an integrated model.
- Include fun recreational activities that promote good health. The focus would be on preventing future health problems. Obesity, drugs and sexual activity cause Hawaii's major preventable health problems.
- Visitors who come to Hawai'i because it is a healing place. The climate and host culture create an environment where people can feel better about themselves.
- Health and wellness events, such as conferences and retreats attract visitors to the state. Once here, they can visit 'one stop shops' where a variety of wellness therapies are available. While here, visitors have a rich, authentic cultural experience.
- The word 'wellness' does not exist in the dictionary. There is a difference between health and wellness. Health is not just a matter for M.D.s, but also complementary and alternative forms of medicine as well. Different people are comfortable with different approaches, depending on their beliefs.
- We need to first figure out who our potential customers are. What are their demographics? Do we offer the types of services they seek? Would they come to Hawai'i for health or wellness reasons?"
- A database of practitioners providing pre-arrival information to customers.
- Hawai'i has a strong brand, and an opportunity to draw new visitors looking for wellness or fitness activities and experiences.

- Intention is important – getting people to visit Hawai‘i with the intention of some sort of health and wellness experience here. Can relate to the mind, body, heart or spirit.
- Intent is the key, to create a more defined purpose than in the past.
- The state has a unique opportunity. Aging Baby Boomers are interested in health and wellness, including organic foods, exercise, spiritual experience and a variety of wellness modalities. Vision of Hawai‘i as a big toolbox offering what they are seeking. These tools benefit visitors and local residents alike.
- The creation of conferences and special events related to health and wellness that attract large numbers of visitors to Hawai‘i.
- More clinics that offer a variety of healing modalities – ‘one-stop shopping.’
- Health and wellness services that are readily available to visitors, beyond the spa services that are currently available in large hotels.
- Connecting visitors who seek services with Hawai‘i practitioners providing health and wellness services.
- Providing information to visitors on what is available.
- Creating educational opportunities for visitors interested in learning about unique aspects of the host culture, such as traditional healing practices and ethno botany.
- Hawai‘i being known as a place where health and wellness are the way of life. The ideal place for humans to experience good health and wellness.
- Hawai‘i currently has a wide range of health and wellness assets. In addition, it is a special place – one of the few places on Earth where the land still speaks to you. That should be at the core of all inventory items in the health and wellness tourism initiative.
- To create a better relationship between visitors and residents. This can be part of getting away from the concept of mass tourism – a spectator sport – towards a model based on a reciprocal relationship between host and guest. In this model there is a meaningful exchange between host and guest. Example: giving every guest who checks into a hotel a bag so that they can pick up *opala* (trash) while they are visiting. In exchange for filling the bag with *opala*, the guest would receive a small gift in appreciation.
- If an ill visitor comes to Hawai‘i and is healed, how do they reciprocate to Hawai‘i?
- Hawai‘i needs to be a healthy environment if we want to offer healing services to the outside world.
- What is wellness tourism? Pre-arrival intention is the key. People coming to Hawai‘i specifically for their health and wellness needs.
- *Kuleana*: teaching that it is each person’s responsibility to engage in healthy behaviors, in order to promote a healthy lifestyle.
- Hawai‘i providing a venue where people seeking wellness of mind, body, heart or spirit can find what they are looking for.
- Hawai‘i as a place you can escape to in order to find yourself.

## **Hawaii's Healing Tradition**

Hawaii has always been a healing place. Even Waikiki, Hawaii's most urban resort area, has a healing tradition. About 600 years ago four visitors from Tahiti, Kapaemahu, Kahaloa, Kapuni and Kinohi arrived in Waikiki. According to George S. Kanahele's Waikiki 100B.C. to 1900 A.D.: an Untold Story,

*“Legend holds that they were also powerful healers known for their marvelous cures. Though their work centered in Waikiki, their fame spread all over O‘ahu ‘from headland to headland.’ They were welcomed everywhere by the people because of their kind, gentle and courteous nature.”*

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## **Working Group Members**

Kokua also acknowledges the efforts of the following individuals who participated in the working groups.

## **Product Inventory**

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Maurice Kaya, DBEDT  
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## **Networking & Planning**

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Monica Roberts, Hawaii Wellness Institute

Sheea Shafer, Hawaii Holistic Wellness Association  
Ramsay Taum, Native Hawaiian Hospitality Association  
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**Business Plan**

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**Education & Certification**

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Sheea Shafer, Hawaii Holistic Wellness Association

Ramsay Taum, Native Hawaiian Hospitality Association

Winston Welch, *Zento Magazine*

### **III. Project Working Groups**

To gain input from a wide variety of stakeholders in the healthcare, wellness and tourism fields, Kokua conducted a series of working group meetings.

#### ***Purpose***

Six working groups were formed, comprised of leaders in the healthcare, wellness and tourism industries, as well as government and academia from across the state. Participants were all key agents of change in their respective fields and who are willing to take an active role in their committee. Each working group discussed aspects of one of six areas, and made recommendations that were considered for inclusion in the final business plan for the state's health and wellness tourism initiative. In addition to gathering input, another purpose of the working groups was to obtain buy-in from key stakeholders.

#### ***Meetings***

A series of three working group meetings were convened in early 2004.

1. March 3 and 4
2. March 24 and 25
3. April 14 and 15

The mission statements for each of the working groups were as follows:

#### **1. Product Inventory Committee**

This group will define the parameters of health and wellness tourism by identifying, cataloguing and analyzing Hawaii's existing services, products and infrastructure on all islands. This should include distinguishing between various practices available in Hawaii.

#### **2. Networking and Planning Committee**

This group will inform, educate and have dialogue with local agents of change and organizational stakeholders. They will conduct networking interviews and contact people to expand reach and engage them in this health and wellness effort. They will also assess the socio-cultural and environmental impact of health and wellness tourism in Hawaii. Finally, they will be instrumental in planning, organizing and implementing a one-day workshop/seminar that will bring all committee members and additional stakeholders together to discuss health and wellness tourism in an open forum.

**3. Business Plan Committee**

This group will complete and finalize the state's health and wellness tourism road map. They will assemble multi-level input from the Host Culture, Stakeholders, Health Institutions and the Visitor Industry. They will then publish a plan for implementation of health and wellness tourism in Hawaii.

**4. Incubator & Business Development Committee**

This group will develop a plan/process for training personnel currently in the health and wellness tourism industry and those who plan to enter it. They will discuss infrastructure and product development, as well as consultations and guidance for employment. This group will also look at strategic alliances between practices and venues as well as the possibility of SBA and Federal grants for health and wellness business plans.

**5. Education & Certification Committee**

This group will develop a system, plan or process by which to identify health and wellness practitioners/businesses and assess the feasibility of developing standards of conduct for the industry with sensitivity to the qualitative aspects of each segment of business. They shall consider a plan for a one-stop shop to facilitate the process of obtaining all necessary documents, including the standard of conduct and possibility of credentialing. The working plan shall include, but not be limited to three core points: Safety, ethics and credibility.

**6. Marketing Committee**

This group will define the health and wellness product and evaluate strengths, weaknesses, opportunities and threats. They will gain an understanding of target markets in order to discuss preliminary packaging efforts. This group will then help create the health and wellness tourism brand and position the product as it advances to the next level, which shall include a mission and vision for Hawaii's health tourism industry. The plan shall include a market survey, a design of a global marketing and promotional plan, and ideas for collateral and website development.

***April 29, 2004 Workshop***

The project culminated in a full day workshop on April 29, 2004 at the Hawaii Convention Center. This workshop brought together all working group members, health and wellness stakeholders, tourism industry stakeholders and the general public to present and discuss working group findings and launch the next phase in development of Hawaii's health and wellness tourism initiative. Copies of the meeting summaries from each of the working group sessions and the April 29 workshop are included in the Appendix to this report. Input from the working groups and the workshop was incorporated into this strategy for Hawaii's health and wellness tourism initiative.

## **IV. Market Analysis**

### ***Various Models of Health and Wellness Tourism***

The health and wellness segment of the travel market is in the developmental stage. As an emerging segment, there are different definitions of the market, and different models currently in operation. For the purpose of analysis, the team considered three different models currently in place.

- Modern Medicine
- Spa and Springs
- Spiritual

#### **Modern Medicine**

The modern medicine segment of the health and wellness market is driven by patients seeking healthcare services that are not available where they live, or seeking treatment at a facility known as a center of excellence in a particular field. The argument could be made that travel for the purpose of modern medical services is not leisure travel. Rather it is usually the result of a life-threatening or serious medical situation. Examples of destination medical centers in the U.S. include:

- Cleveland Clinic in Cleveland
- Johns Hopkins Hospital, in Baltimore
- Mayo Clinic in Rochester, Minnesota
- Sloan-Kettering Cancer Center in New York

Internationally, the United Arab Emirates, which has built itself into a major leisure travel destination, is also currently developing a modern medical center for the purpose of drawing business from around the Middle East and Asia. Known as Dubai Healthcare City, the development has brought in Harvard University Medical School and the Mayo Clinic as its partners.

Modern medicine has in the past been a model of health and wellness tourism pursued by the State of Hawaii. In the past, the target has been wealthy individuals from Asia-Pacific nations traveling to Hawaii for medical procedures in one of the state's acute care hospitals. In addition, travel for the purpose of modern medicine is a segment of the inter-island travel market, as Neighbor Island residents travel to Oahu for healthcare. Given the fact that none of Hawaii's acute care hospitals are ranked among the top medical centers in the U.S., it is unlikely that modern medicine can be a lead element in Hawaii's health and wellness tourism industry. That is not to denigrate the quality of the

healthcare available in the state or minimize the importance of Hawaii's modern medicine assets.

Hawaii's hospitals and other modern medical assets will play an important role in the industry as it develops. If Hawaii did not have high-quality modern medicine, it would likely not be able to credibly position itself in consumers' minds as a leading health and wellness destination. As such, Hawaii's modern medicine assets can be viewed as the 'price of admission' to competing in the health and wellness segment of the travel market, rather than the 'stars' that will attract visitors.

## Spa and Springs

Visiting hot springs or 'healing waters' is a leisure activity that can be traced back to ancient Greece and the Roman Empire. In Renaissance Europe cities such as Spa, Belgium, Baden-Baden, Germany, and Bath, England, became destinations where visitors enjoyed the natural thermal waters that were believed to have healing properties.

Currently there is a Spa craze in the leisure travel industry. Spas have become an essential component of the high-end resort hotel experience. Some of the luxury hotels built in Hawaii in the 1990s included spas, led by the Grand Wailea Resort Hotel & Spa. In recent years, most of Hawaii's high-end resort hotels have added a spa, as customers came to expect a spa experience to be part of their resort hotel stay.

On Oahu, the Hilton Hawaiian Hawaiian Village, Hyatt Regency Waikiki, Halekulani, Royal Hawaiian Hotel, Waikiki Marriott Resort and Kahala Mandarin Oriental Hotel have all added spas in recent years, representing tens of millions of dollars of investment.

The April 2004 issue of *Condé Nast Traveler* included the results of a readers' poll rating 224 spas. Hawaii spas were rated very highly in the resort spa category, including the number one resort spa, four of the top ten and seven of the top 20. Hawaii's top resort spas were as follows:

1. Four Seasons Resort Hualalai
4. Four Seasons Resort Maui at Wailea
5. Lodge at Koele
10. Anara Spa at the Hyatt Regency Kauai
11. Spa Grande at the Grand Wailea Resort
17. Spa Without Walls at the Fairmont Orchid Hawaii
20. Fairmont Kea Lani

Source: *Condé Nast Traveler*

*Condé Nast Traveler*'s readership is affluent and knowledgeable about travel and leisure destinations. The fact that these readers rated Hawaii's resort spa assets so highly

indicates that the state is considered a leader in this segment of the health and wellness tourism industry.

## **Spiritual**

Similar to ‘Spa and Springs’ travel, travel for spiritual reasons is an ancient form of leisure travel that is flourishing today. Jerusalem has been a destination for sacred journeying for Christians for over 1,500 years. Globally, spiritual travel is believed to be one of the larger segments of the wellness travel market.

In addition to religious-based travel such as Christian pilgrimages to Jerusalem or the Muslim *haj* to Mecca, New Age-type travel has seen growth in recent years. This includes travel to the following:

- Sacred sites, such as Machu Picchu, the Egyptian or Mayan pyramids
- Energy vortices, such as Sedona, Arizona
- Yoga retreats, or the study of other Asian disciplines
- Spiritual rituals such as American Indian sweat lodges

Hawaii has a number of assets that make it well positioned for this segment of the wellness travel market. These include a unique Host Culture, a diversity of cultures with a variety of religions and spiritual philosophies and the state’s natural beauty. Two examples of existing spiritual destinations that attract pilgrims are the Wood Valley Temple and Meditation Center, a Buddhist temple and meditation center located in Ka‘u on Hawaii Island, and Kauai Aadheenam, a Hindu Monastery on Kauai. There is also a magazine devoted to Hawaii’s spiritual travel segment, *Zento Magazine*.

## **Competitive Destination Analysis**

The team researched the websites of destinations around the world and the United States to gain a preliminary understanding of a sample of other destinations are positioning and promoting the health and wellness segment.

### **International Market**

As a sample, information from one Asian destination, one European destination and one Latin American destination have been included.

#### **Costa Rica ([visitcostarica.com](http://visitcostarica.com))**

Costa Rica has a strong eco-tourism brand and is considered progressive in sustainable tourism development.

Health and wellness is not listed on their home page, but several health and wellness activities are located on an “Activities” pull down menu on a “Tours” page linked to home page. The health and wellness-related offerings include Spas, Health and Surgery, and are listed alongside market segments such as Meetings & Conventions and Honeymoon.

Interestingly Costa Rica was one of the few destinations the team researched that touted modern medicine as one of its health and wellness products. The country’s rainforest and ecotourism experiences dominate Costa Rica’s visitor market. Their health and wellness product appears to be mostly positioned as a secondary, add-on experience. The exception to this would be the surgery segment, which is targeted at visitors whose primary intention is health and wellness.

#### **Switzerland ([switzerlandtourism.ch](http://switzerlandtourism.ch))**

“Wellness” is one of 13 experiences listed on the home page of the Switzerland tourism site. On the “Wellness” page there are links to wellness destinations and wellness hotels. The site is heavily oriented toward hotel spas.

The site also has a new ‘wellness finder’ feature that has a broader scope than just spas, although spa treatments still dominate. It has a drop down menu where the user scrolls through extensive spa treatments (including *lomi lomi*) but also other health and wellness offerings such as acupuncture, reiki, meditation and yoga.

Switzerland also produces a 56-page wellness brochure. Their health and wellness market is driven by destination spas within hotels. The ‘wellness finder’

appears to be an effort to broaden the product offerings, but the focus remains on spas within hotels.

**Thailand (tourismthailand.org)**

Scrolling text on the home page touts Thailand being named the top holiday spa destination in Asia Pacific. Under the “Adventures & Activities” menu one selects “Special Interest Activities”, under which there are six activities listed, including “Thai-Style Natural Healing,” “Buddhist Meditation,” “Agrotourism” and “Thai Cooking Courses.”

Each of these can be considered health and wellness activities. Under “Thai-Style Natural Healing” there are descriptions of traditional healing, massage and herbal therapies. The site also provides descriptions and contact information on six spas, and no listings of traditional healers.

Thailand has also produced a high-quality health and wellness brochure as far back as 1998 that also touts modern medicine. Of the three international destinations surveyed, Thailand appears to be taking the most comprehensive approach to health and wellness tourism product.

**US Market**

Kokua also researched the web presences of three domestic competitors, Arizona, Florida and San Diego.

**Arizona (arizonaguide.com)**

There are 17 spa listings with direct links to their websites under “Resorts to Ranches” menu on the home page. Spas are listed at the same level as Resorts, Hotels/Motels and Guest Ranches.

Other than the spa listings, there is so health or wellness effort visible. To find information on the state’s well-known spiritual experiences, a user needs to first go to Sedona region, where there are listings of “Personal Enrichment” experiences. With high-quality resort spas, a desert climate and world-famous spiritual experiences, Arizona appears to have in place the key elements for a broad-based health and wellness tourism product.

**Florida (flausa.com)**

On the state's homepage, the "Interests" drop down menu lists Spas as one of 14 categories, along with Beaches, Golf and Attractions. There are listings of hotel-based spas by city, with links to information and the ability to make hotel reservations. Spas are also listed as "Spas & Indulgence Vacations."

Florida does not appear to aggressively marketing a health and wellness product, limiting its efforts to spa experiences.

**San Diego (sandiego.org)**

Under "What to Do" on their home page, "Spas and Salons" is one of the options. From there, they have links to "Beauty Salons / Day Spa", "Holistic Health" and "Massage Therapy," which link to listings of between one and six providers.

In September 2002, the San Diego Convention & Visitors Bureau announced a new "Nature and Nurture" initiative, selling, "all that is natural, healthful and soothing about" San Diego. From a review of the website it does not appear that this program has been implemented.

## V. Competitive Analysis

### **S.W.O.T. Analysis**

Kokua analyzed Hawaii's strengths, weaknesses, opportunities and threats as a health and wellness destination.

#### **Strengths**

- **Host Culture:** Hawaii's host culture and its healing traditions differentiate Hawaii's health and wellness tourism product from competitors.
- **U.S. modern medicine:** This is particularly true with respect to competing destinations outside of the United States.
- **Diversity of cultures, healing modalities:** The diversity of experiences, cultures and healing modalities represented in Hawaii mean that Hawaii's health and wellness tourism product will appeal to a wide range of customers.
- **Climate:** Hawaii's climate is ideal for humans on a year-round basis.
- **Healing tradition:** Hawaii has long been described as a 'healing place.' It already is a health and wellness destination.
- **Commitment to tourism product development:** The State of Hawaii, through the Hawaii Tourism Authority, is committed to tourism product development in the interest of strengthening and diversifying Hawaii's tourism product.
- **Academic resources:** The University of Hawaii System can be a valuable partner going forward, with the academic research of UH Manoa's Travel Industry Management School, School of Business and John A. Burns School of Medicine to the hands-on hospitality programs at the community colleges around the state.

#### **Weaknesses**

- **Poor health of Hawaiian community:** The state's native Hawaiian population is among the least healthy in Hawaii, suffering high rates of obesity and diabetes. How can the state market itself as a healing destination when the Hawaiian community is not healthy?

- **Strong existing leisure brand:** High consumer awareness of Hawaii and positive perceptions about Hawaii are assets. Consumer research may indicate, however, that health and wellness does not fit in with perceptions of the Hawaii brand.
- **Lack of modern medical stars.** The state's lack of top modern medical facilities (No Hawaii cancer or heart programs are ranked among top 50 in U.S. by *US News & World Report*) may limit the state's potential as a health and wellness destination.

## Opportunities

- **Growth industry:** The growth of the resort spa segment in recent years indicates that the entire health and wellness tourism segment could be an area of growth in the near future.
- **Favorable demographics:** Between the aging U.S. Baby Boomers and an aging Japanese population, health and wellness is becoming a more important consideration among consumers in Hawaii's biggest source markets.
- **Potential for high-wage job creation:** Hawaii's economy stands to benefit from a vibrant health and wellness tourism sector, as increased demand for services leads to job creation in the healthcare sector.
- **Potential for grass roots economic development:** With the incubation and business development functions assisting small businesses and start-ups in targeting the visitor market, there is the potential for the benefits of the growth to accrue at the grass-roots level, rather than only existing large businesses.
- **Improve healthcare system for resident population.** Growth among providers of health and wellness services in the state will provide improved access and choices to the resident population.
- **Position as Health and Wellness destination can diversify Hawaii's pure leisure image.** Establishing a strong brand as a health and wellness destination can contribute to Hawaii's efforts to diversify its existing leisure image. If successful, this could help with the state's efforts to establish itself as a business destination.

## Threats

- **Hawaii could lose the ‘first mover advantage’ to a competing destination:** If the state waits too long, a competing destination will establish itself as a health and wellness destination, weakening Hawaii’s product by making it look like a ‘me too’ proposition.
- **Hawaii will be confined to being a ‘spa destination’ if the state doesn’t develop the product.** If the state does not make an effort to develop the product through the incubation and business development function, Hawaii runs the risk of being narrowly defined as a ‘spa destination.’ If this happens the state will not realize the full potential of the health and wellness segment.
- **Hawaii loses a key point of difference if it doesn’t include the host culture in a meaningful way:** Representatives of the host culture have been invited to participate in this initiative from the start. Their continued participation will allow us to incorporate authentic host culture experiences into Hawaii’s health and wellness product. This will not only be unprecedented in Hawaii visitor industry product development, it will endow the product with a powerful and unique point of difference that will differentiate us from competing destinations’ products.

## **VI. Strategy for Hawaii Market**

Kokua envisions a strategy for developing Hawaii's health and wellness tourism market that has two components, a product strategy and a marketing strategy. One of the challenges of developing a health and wellness tourism sector is that the product itself needs to be defined. Another challenge is to make the product as safe, ethical and credible as can be reasonably expected. The team's proposed product strategy addresses these challenges.

The goal of the marketing strategy is to communicate the brand message of Hawaii's health and wellness tourism product to potential customers in such a way that motivates travel to Hawaii.

### ***Product Strategy***

The proposed product strategy consists of three components:

- Inventory Cultivation
- Business Development & Incubation Function
- Education & Certification Function

### **Inventory Cultivation**

#### **Background**

Inventory cultivation is the process of defining what experiences and healing modalities will be part of Hawaii's health and wellness tourism product. The inventory should be inclusive of a wide variety of experiences and modalities, rather than being confined to modern medicine or spas.

This inclusive approach is an acknowledgement that Hawaii has many diverse health and wellness assets. Hawaii has a diversity of cultures represented here, including a unique host culture with its own healing traditions. The state has an ideal year-round climate and access to a variety of ways to interact with nature.

#### **Major Issues Addressed in Working Group**

**Terminology:** The group debated some of the terminology associated with the project. There was objection to the use of the terms 'modern medicine' and 'science-based medicine' when used to describe the medicine practiced by M.D.s, on the basis of the fact that other forms of medicine may be described as modern

and have bases in science. Use of the terms ‘alternative medicine’ and ‘complementary medicine’ was also debated.

The group also discussed how the word ‘tourism’ might not be appropriate for describing the current health and wellness initiative. Tourism implies passive visitation rather than a meaningful experience involving a guest, a host and a place.

It was agreed that differences in terminology will exist, and that terminology changes over time. The tool is ultimately developed to access Hawaii’s health and wellness tourism product should accommodate multiple terminologies, rather than trying to force customers to use terminology the working group may prefer.

**Role of Host Culture:** It was generally agreed that the host culture should be represented in the development and implementation of Hawaii’s health and wellness tourism segment. The Hawaiian working group committee members made it clear that they do not speak for the Hawaiian people and that there is a diversity of opinions within the Hawaiian community. Some practitioners of Hawaiian healing will want to participate in Hawaii’s health and wellness tourism initiative, while others will not.

The committee envisioned specific host culture experiences and healing modalities being included of the inventory that comprises the health and wellness tourism product. The main challenge with this is a result of the fact that the majority of authentic Hawaiian healers are non-professional in the sense that they do not currently operate, or wish to operate, on a fee-for-service basis.

Beyond its representation in the product inventory, the host culture should be represented in the development and implementation of the health and wellness tourism initiative. Specifically, practitioners who participate in the program should learn about the host culture traditions and history. Among other things, this will provide added-value to customers and differentiate Hawaii’s health and wellness tourism product from that offered by competitors.

**Experience-based classification:** After reviewing a number of different proposed methods for defining and classifying the elements of Hawaii’s health and wellness tourism product, the committee endorsed a structure developed by Laura Crites of the Hawaii Wellness Tourism Association and Betsy Crites. The system they developed was inspired by a speech given by Dr. Pauline Sheldon of the University of Hawaii at Manoa’s School of Travel Industry Management. It includes seven experience-based categories:

- Relaxation, Rejuvenation & Retreat
- Inner Pilgrimage

- Fitness & Sports
- Lifestyle Modification
- Travel for the Purpose of Serving Others
- Complementary and Alternative Medicine
- Nature as Healer

**Preliminary analysis of major categories:** Kokua developed a preliminary product inventory matrix based on this experience-based structure. In doing so several sources were drawn from, primarily Hawaii Health Guide.com, the Phase I report of this project, and the team's knowledge of the market. During this process the team noticed that the system did not easily lend itself to two areas that should be included.

One of these was education, which was accommodated by grouping it with Lifestyle Modification to create a Lifestyle Modification & Education category. The second area not easily accommodated was modern medicine. The team considered adding it to the Complementary and Alternative Medicine category but in the end decided to add Modern Medicine as its own category. The reason for this was twofold. One reason was that the size of a combined Complementary and Alternative Medicine/Modern Medicine would dwarf all of the other categories. The other reason was based on input that physicians strongly resisted being listed in directories alongside alternative medical practitioners. M.D.s want their names to be listed with other M.D.s, not mixed in with Naturopaths and Chiropractors.

A copy of the draft product inventory was provided to each member of the Product Inventory working group for their comment and assessment of the market-readiness of each experience or healing modality. This was done to gain a preliminary sense of prioritizing the experience groups. Specifically, the team was interested in which were relatively more ready to go to market and which would require more product development. It should be noted that these results were based on a relatively small sample size and therefore should not be considered definitive.

Kokua tabulated the results and compiled the data by experience category as follows:

Experience-based Inventory Categories	Market Readiness		
	Now	6 to 12 Months	Future
Modern Medicine	89%	3%	3%
Fitness & Sports	88%	5%	2%
Relaxation, Rejuvenation & Retreat	83%	5%	0%
Nature as Healer	67%	11%	14%
Travel for the Purpose of Serving Others	59%	16%	16%
Complementary & Alternative Medicine	50%	10%	24%
Lifestyle Modification & Education	46%	13%	11%
Inner Pilgrimage	40%	25%	13%

On average, respondents rated 89% of the individual inventory items in the Modern Medicine category as being ready to offer services to visitors now, with 3% being rated as needing six to 12 months of product development before being ready, and another 3% needing more than one year of product development.

**Next Steps:**

- Develop criteria for assessing individual inventory items
- Prioritize the inventory items for marketing and incubation purposes
- Island by island analysis

## **Business Development & Incubation Function**

### **Background**

Another aspect of product development that is needed in developing Hawaii's health and wellness tourism industry is the business development and incubation function. Many of Hawaii's existing health and wellness providers are not currently serving the visitor market. The business development and incubation function will provide services to interested practitioners that would equip them for serving the visitor market.

Incubation services would be geared toward start-up health and wellness businesses looking to serve the visitor market. Business development services would be developed for existing businesses or providers currently serving the resident market who are interested in expanding into the visitor market.

### **Major Issues Addressed in Working Group**

**'Bricks and Mortar' presence or 'Virtual' incubator:** One of the questions that was addressed by the working group was whether the Business Development/Incubation function should have a physical, or 'bricks and mortar' location where people would go for services. The less-costly alternative would be a model where services were provided via telephone and computer, a so-called 'virtual' incubator.

The consensus in the working group was that the 'bricks and mortar' model was preferable, with the understanding that funding sources to establish and operate such a facility would need to be identified. An incubator/business development center offering only 'virtual' services would be inadequate to meet the needs of smaller, grass-roots type providers who may lack access to a computer.

### **Types of Services Needed**

The group also addressed the issue of what types of services should be provided by the Business Development & Incubation function. Incubators such as the Manoa Innovation Center provide office space and shared facilities such as fax and photocopy machines, voicemail and mail services in addition to business development services, access to sources of capital and networking.

There is also an existing healthcare business incubator in operation in Honolulu. The Hawaii Healthcare Business Incubator ("HHCBI") is funded by HMSA, Kapiolani Health and Integrated Services, Inc. The HHCBI currently offers facilities, shared services and business development services to six healthcare-related start-ups.

**Funding Sources:** The Business Development & Incubation function for Hawaii's health and wellness tourism initiative will be long-term, if not

permanent, project requiring ongoing funding. Since ongoing funding for such a facility is beyond the scope of the mission of the HTA, alternate funding sources will need to be identified.

Some of the possible funding sources that were identified include:

- State of Hawaii and county economic development funding
- Federal economic development funding
- Private foundation support
- Visitor industry and professional association support

**Pilot Projects:** There may be opportunities to establish pilot incubator projects for health and wellness tourism using federal funding. The most likely areas would be rural communities on the Neighbor Islands that qualify funding from the Department of Agriculture and other federal agencies. The State of Hawaii's Department of Business, Economic Development & Tourism can be instrumental in identifying opportunities for which federal funding may be available.

**Partnerships:** Another possibility for housing and funding the Business Development & Incubation function is to establish partnerships with existing entities to share resources. One possibility would be to partner with an existing incubator such as the Hawaii Healthcare Business Incubator. Another possible partner would be the University of Hawaii System. With ten campuses across the state, and programs in healthcare and hospitality, the UH System could be a good candidate to partner with.

**Next Steps:**

- Plan Business Development & Incubation facilities and program
- Identify funding sources and partners
- Identify pilot projects

## **Education & Certification Function**

### **Background**

The Education & Certification function is an important element of the Hawaii's health and wellness tourism product. Because the product deals with people's health, health and wellness tourism demands higher standards of quality than other tourism products. In the interest of making the product safe, ethical and credible, it is recommended that some form of provider vetting be required. Providers and experiences that qualify for certification would earn some sort of 'wellness label.'

One of the challenges of this effort will be to develop a meaningful certification program that encompasses the wide diversity of Hawaii's health and wellness assets, ranging from

credentialed medical practitioners, to nature experiences, to uncredentialed healing modalities such as traditional Hawaiian healers.

### **Major Issues Addressed in Working Group**

**Role of Certification:** The vision for certification evolved during the working group process. Originally, it was called the Credentialing Working Group but that name was discarded in favor of Certification. The consensus was that credentialing should be a function of government, which serves as a ‘gatekeeper’ determining whether or not a practitioner will be allowed to legally provide services to the public.

Rather than being a gatekeeper, the committee believed that the process applied in health and wellness tourism should be a voluntary value-added designation. There would be some sort of ‘seal of approval’ earned by providers interested in participating in the state’s health and wellness tourism initiative. Potential customers would know that a provider who had the ‘seal of approval’ had completed some sort of certification program, and this would provide some level of comfort to the customer.

The consensus was that education should form the primary basis of the certification. As a result, the team decided to call this the Education & Certification function.

**Components of Certification:** A number of different components of a certification program have been considered, including:

- Specialty-specific credentials (board certification, MAT#, etc.)
- Completion of recognized schooling/training program
- Peer assessment
- Hospitality training
- Host culture training
- Number of years in service, or service hours provided
- Continuing education / specialty training
- Customer feedback
- On-site inspection of facilities

**Non-credentialed experiences and modalities:** It was recognized that practitioners of healing techniques that are not currently credentialed have a lot to offer to this initiative. As such, there needs to be a way for them to be included in health and wellness tourism despite the lack of formal credentialing.

**Costs of Certification Function:** Similar to the Business Development / Incubation function, the certification function will require the establishment of a permanent organization to administer the certification. The certification function costs will be higher if the on-site inspection of facilities is included as one of the

elements of certification. The cost of administering the certification could be paid by users, in the form of an annual membership fee.

**Education and Phased Approach:** There was consensus in the working groups and during the April 29 workshop in support of host culture and hospitality education being the foundation of the certification process. The education component could be a first step in achieving the objective of making Hawaii's health and wellness tourism product a high-quality visitor experience that is respectful of the Host Culture.

There was disagreement regarding what additional elements the certification function should include. Two different models were discussed:

- A formal, institutionalized approach was the first model. Some new or existing organization would administer a program that included elements such as specialty-specific credentials, completion of recognized schooling/training program, years in service, or service hours, continuing education / specialty training and on-site inspection of facilities.
- An informal customer feedback system was the other model proposed. In this model, customer feedback is collected and made available to potential customers, similar to the feedback system used on eBay. The advantages of this model are the lower cost to administer and the fact that does not require creation of an entity that is certifying providers as being safe, ethical and credible.

**Next Steps:**

- Identify partners for host culture and hospitality education functions.
- Begin planning the curriculum and plan for statewide implementation.
- Continue to research alternatives for further certification elements.

## **Marketing Strategy**

As most marketing professionals understand, there is a basic approach used for developing any type of marketing plan. Because the working groups ran in parallel with each other instead of in a series, Kokua is lacking some of the most pertinent information needed to make critical marketing decisions. The marketing working group committee did the best they could under these circumstances.

The key information missing for this aspect of the business plan is market research. Not because it lacks importance, but because under budget constraints of the proposal Kokua was unable to do any research. It is our recommendation that if health and wellness tourism is to be pursued as a viable market segment for Hawaii, research needs to be done in the near future.

The research needed is what has been referred to as “Speaking with Customers.” There were discussions on everything from focus groups across the Mainland and Japan to exit surveys of current visitors and even a modified survey instrument from Harvard University. There are currently ways in which to get secondary research on this market from sources such as *Zento Magazine*, spa industry customer surveys and visitor satisfaction surveys. In addition, there is an interest in having health and wellness added to DBEDT and HVCB surveys currently in existence.

Both primary and secondary research would allow a greater understanding of our target markets including the propensity for travel to Hawaii for health and wellness. This research should help us know which major market areas to target, what the demographics are on these individuals, and which areas of our current and future product inventory infrastructure would attract the most visitors. The market research will be very helpful in defining what our product is, who our potential customers are, and if Hawaii can meet the customer’s needs/desires for health and wellness.

## **Experience Based Approach**

After the experience-based classification system was cultivated in the product inventory working group, it was presented to the marketing working group as a potential point of departure for any type of marketing campaign the state would initiate. The marketing group embraced an experience-based model for marketing and began to prioritize these experiences based on results from the product inventory matrix.

Although modern medicine ranked highly in the matrix results, it is the price of admission for being able to entertain the concept of health and wellness tourism, NOT a driving force behind why visitors would choose to come to Hawaii for health and wellness. Modern medicine provides a level of comfort and feeling of safety, but is not a deciding factor for travel to Hawaii. Because of this, focus has been placed on those

areas that also ranked highly in the matrix such as relaxation & rejuvenation, nature as healer and fitness & sports.

The state already has a well-established and highly regarded relaxation & rejuvenation product in the form of spas that have been built in the state's hotels. The April 2004 issue of *Condé Nast Traveler Magazine* rated seven of the spas in Hawaii hotels among the top 20 resort spas in the United States.

## **Develop Unique Hawaii Brand**

It became clear at the April 29<sup>th</sup> workshop that many in attendance felt ALL the experience-based categories are currently viable, so the decision will need to be made as to whether or not to have a phased approach for marketing and only pick those experiences currently ready to go to market or create a total overall brand identity for health and wellness tourism. Because there is no conclusive research, efforts could be focused on rolling out lead items that already have a following such as the spa industry or items that differentiate Hawaii from other destinations.

What sets Hawaii apart from other destinations? Obviously our Host Culture is the primary differentiator from other destinations. Healing has been a major part of Hawaiian culture since the first Polynesians landed on these islands. In fact, Hawaii has always been a place of healing, whether it has been marketed that way or not. Because of this, Hawaii is one step ahead of other competing health and wellness destinations.

This process must continue to be respectful, thoughtful and inclusive when it comes to our Host Culture. The marketing efforts should not offer this unique culture as window dressing, but should have representatives at the table when making all future decisions. By doing this, the jump can be made from traditional marketing to a new way of doing things. Without Host Culture participation, the risk of having an unauthentic message is greatly increased.

On April 29<sup>th</sup> there were many discussions on the "Authentic Experience." What is it and how do we find it to market it properly? Many travelers today covet this experience and health and wellness tourism could provide the forum to showcase not only traditional Hawaiian Healing modalities, but many of the Asian and Polynesian modalities offered in Hawaii. When branding Hawaii as the preeminent health and wellness destination in the world, one phrase from Peter Apo could be considered, "Healing is the Feeling."

## **Use Existing Infrastructure as Base**

It seems likely marketing will follow a two-pronged approach. Once the market research is done, a combination of events will occur. The first being identification of the overall branding message which will encompass all of Hawaii's health and wellness services, such as "Healing is the Feeling." The second will be to lead with certain inventory items

currently in existence that fall under the seven experience-based categories. This effort could be in conjunction with or anchored by existing events, expos, conventions, conferences and CME's (continuing medical education) that focus on health and wellness.

It will be important to develop a sequential marketing plan to understand where the product is and where it needs to be while including the seven experiences and overall brand message. The plan should look out 10-20 years and be a road map to develop a product that no other destination can take from us. This may include development of additional events on each of the islands that would not only attract visitors but also bring the community into the process by allowing them access to these events, expos, conventions, conferences and CME's for their own health and wellness education.

By building around existing or future events, Hawaii can begin to package items like the Honolulu Marathon or Ironman with "how to optimize peak performance" events prior and "recovery/rehab" events after. In fact, travel agents are already calling the Hawaii Wellness Tourism Association requesting information on health and wellness tour packages.

Partnerships and strategic alliances will play an important role in packaging efforts. Our spa participants stated many visitors are looking for something Hawaiian in nature that is unique, as well as the packaging of products and services. This provides an exciting model for marketing as the plan is developed, as long as our unique attributes are promoted with integrity. The message chosen must resonate with our customers and must be true. The time has come to begin promoting this market so Hawaii can own it.

## **State Marketing**

Many visitors feel as if they are coming home when they visit Hawaii and are looking for comfort spiritually, physically and mentally. The marketing implemented should have less to do with mechanics than mindsets, as many visitors have a hard time explaining what it is that draws them to Hawaii. Mentioned often is the "Sense of Place" or Hawaii is "Magical". Many come to Hawaii for healing but don't know it and can't articulate it as a reason for visiting. Therefore, the health and wellness brand created will lend itself to the ease of labeling and educate people on how to satisfy their wants and needs.

Hawaii cannot continue to do the same things in marketing and expect to get different results so a new model for tourism will be created, one that involves the place, guest and host. Marketing health and wellness should be based on attraction rather than promotion, meaning the quality and integrity of the product should be such that visitors will seek us out without having to be aggressively sold the product. Because a higher standard of product quality is demanded in health and wellness tourism, every aspect of this initiative, from product development to marketing must be done in a *pono* way.

The key will be access. Visitors will need to be provided with access to a wide range of products, services and practitioners throughout the state. Since health and wellness is highly personal, choices will need to be offered to visitors so they aren't forced to follow only one path. Health and wellness tourism does not lend itself to a "one size fits all" marketing approach. The marketing should reflect the concept of inviting people into our home, so when they leave our home is still intact and our guest has been enriched. It should be based on a blend of actual health and wellness services available and the *mana* of the place.

### **Advertising Recommendations**

As discussed, the timing for this effort is perfect. The demand, momentum and shift towards healing and family values since 9/11 have been enormous. Clearly, Hawaii is perfectly positioned to become the healing capitol of world. To get there, Hawaii must focus on targeted health and wellness messages in results oriented advertising vehicles.

- 1) An appropriate media mix must be considered with a heavy skew of advertising dollars going towards health and wellness publications, cable television and health sections of major newspapers.
- 2) Partnerships in co-op ads should be utilized as much as possible throughout magazines and newspapers, with major players that have advertising dollars, such as the spa industry, anchoring Hawaii health and wellness sections.
- 3) Partnerships with local health and wellness leaders such as *Zento Magazine* could be used as fulfillment to the consumer, travel agent and meeting planner segments until health and wellness sections could be included in HTA/HVCB sponsored publications like *Islands of Aloha*. Because health and wellness has a richness of information available, promotional collateral should be easy to develop.
- 4) Travel agents are always looking for new ways to sell Hawaii, so our travel agent publication partners will be able to create new Hawaii health and wellness sections with editorial coverage on this new and evolving market, surrounded by health and wellness industry advertising.
- 5) Meeting planners are looking for new pre and post events, events for spouses, and even new ways to implement health and wellness into company meetings, conventions and incentives. Advertising health and wellness in meeting planner publications will also be important.
- 6) A web-based focus will be critical. Health and wellness will need to be included in all state sponsored sites like HTA, DBEDT and HVCB. In addition, a new website should be considered for phase III of this project that would be a basis for infrastructure development and consolidation of many scattered current efforts. This site would be able to link to existing Hawaii health and wellness websites like HawaiiHealthGuide.com, alohawellnesstravel.com, Hawaii-healing.com, hwta.net and hawaiiicotourism.org. Actual advertising dollars could be spent on websites not locally based but that have major traffic such as SpaFinder.com.

**Travel Promotion Recommendations**

- 1) Strategic alliances need to be formed within the health and wellness community so consensus can be built around what providers and services will work with the tourism industry.
- 2) Potential partnerships could include a combination of spas and sports and fitness events or spas taking on integrative practices or any number of cross-pollination efforts.
- 3) Once these partnerships are formed, health and wellness providers can package products and services together then work directly with the tourism industry (airlines, hotels, ground transportation, destination management companies etc.) to deliver these packages to consumers, travel agents and wholesalers.
- 4) In addition, some tourism industry suppliers like hotels could tap into health and wellness services already in existence to combine urgent care facilities like “Doctors on Call” with educational opportunities like CME’s and even their own spas. Hotels can create packages in-house to meet the needs of their visitors or expand outside and combine internal offerings with Hawaiian healing modalities, integrative healthcare services, nature walks/hikes or a myriad of other services.
- 5) Existing health and wellness events, expos, conventions, conferences and CME’s will need to be monitored for potential packaging efforts, and future events will need to be cultivated to address the demand created by visitors.
- 6) All trade shows that HTA representatives attend such as ITB Berlin, World Travel Market, Pow Wow, ITME etc. will need to have a health and wellness presence for brand development purposes.

**Public Relations Recommendations**

- 1) Invite travel writers from consumer magazines, travel agent publications and meeting planner publications to Hawaii to experience first hand what the concept of health and wellness travel really is.
- 2) Invite key travel agents and meeting planners to Hawaii to experience a myriad of health and wellness services they would not normally have access to.
- 3) Focus on creating a health and wellness label that can be used for branding and public relations purposes.
- 4) Create hype around existing and future events to create more demand and provide exposure to health and wellness products and services not normally associated with the current Hawaii brand of sun, sand and surf.
- 5) Invite television, film and radio personalities to “live” health and wellness in Hawaii by partaking in unique experiences. If we know of anyone searching for certain modalities, bring them to Hawaii to receive treatment or ask part time residents with high profiles (Oprah Winfrey, Kelsey Grammer, Michelle Pfeiffer etc.) to experience products and services in hopes they would be willing to discuss publicly.
- 6) Host a reality television show about extreme makeovers or other health and wellness topics of interest.

## **Individual Project Marketing Parameters**

Throughout this process, continual proof must be supplied to key decision makers within the Hawaii Tourism Authority and State Legislature that health and wellness has the potential to provide a better return on investment than other markets. We need to be crystal clear on why people choose Hawaii instead of other destinations for health and wellness, define which products and services to emphasize and which ones will bring in quality customers.

Hawaii does not necessarily want more visitors, but better ones that stay longer and spend more. Health and wellness provides an incredible opportunity to keep visitors coming back, create loyalty and expand our high satisfaction rate. As stated earlier, Hawaii already owns the sun, sand and surf image and has included whales, water sports, sunsets and even our Host Culture in advertising. What about owning a new brand and building health and wellness as a pillar of Hawaii's tourism market?

## **Developing Marketing Benchmarks**

Benchmarks will need to be set in order to be accountable for all dollars spent on marketing health and wellness. This will need to be addressed by testing efforts and measuring results. Prior to marketing and advertising initiatives, tracking mechanisms must be in place to prove this market can deliver a substantial amount of new and repeat business to all the islands.

## **Developing Marketing Standards**

Although hesitant to make any firm recommendations for marketing since no primary market research has been completed, an understanding of why individuals will travel to Hawaii for health and wellness products and services instead of going somewhere else or even down the street of where they live is important. If benchmarking techniques are implemented and outcome studies provided, branding opportunities should be more readily available. Overall, there must be a consistent, quality delivery of services across the board where the balance between the overall brand and the individual experiences can be maintained.

This initiative will, among other things, market traditional Hawaiian healing techniques. Is there provider capacity to meet the demand that will be created? Is there an interest in meeting this demand? Given the one-on-one nature of the process by which traditional knowledge is taught, traditional Hawaiian healing does not lend itself to a model of rapid capacity increase. Can the integrity of the practices be maintained if the demand for services outstrips the ability to deliver high quality, authentic services?

## **Media Plan**

All media vehicles used will be chosen based on the fact they can help define the health and wellness product as well as promote the health and wellness brand. Much emphasis should be placed on the concept of, “Since the beginning of time, Hawaii has been a place of healing.” There must be care taken with nomenclature used in advertising efforts as “visitor” denotes someone coming to Hawaii to immerse themselves in a “sense of place.” A “tourist” denotes someone passing through that may leave a larger footprint and may not “give something back.”

The below lists are just an initial idea of the types of media vehicles that could be considered in this effort. Although many individuals interested in health and wellness may also read the same travel magazines, watch the same television or access the same websites Hawaii has advertised with over the years, we feel this new brand should enjoy the focus of niche specific media vehicles.

### Magazines

*Health & Wellness Magazine*

*Health*

*Fitness*

*Men's Health*

*Shape*

*Self*

*Living Fit*

*Cooking Light*

*Vegetarian Times*

*Better Nutrition*

*Food & Fitness Advisor*

*Body & Soul*

*Spirituality & Health*

*Yoga International*

*Yoga Journal*

*Focus on Healthy Aging*

*Alternative Medicine*

*Consumer Reports on Health*

*Herbs for Health*

*Nutrition Action Health*

*Organic Style*

*Natural Home*

*UTNE Reader*

*Natural History*

*Discover*

*Audubon*

*National Geographic*

*Wildlife Conservation*

Cable Television

Discovery Health Channel

Fit TV

Healthy Living Channel

Web Sites

Web MD

SpaFinder.com

Newspapers

Major market area newspapers with health specific sections

Media packaging should be utilized wherever possible and bundling of products such as Discovery Health Channel, Fit TV and the Travel Channel all owned by Discovery should be exploited. Destination sponsorships on Web MD or SpaFinder.com should be considered along with the creation of Hawaii health and wellness packages in the travel sections of newspapers. The potential for packaging opportunities and partnerships surrounding health and wellness is immense.

## **VII. Description of Future Phases**

### ***Phase Three – Launch***

In Phase Three – Launch Kokua will conduct market research, develop the Hawaii Health and Wellness Brand and finalize planning on the various product development tasks.

#### **1. Speaking With Customers**

While the team’s preliminary review of the market and anecdotal evidence indicate that a market opportunity exists for Hawaii in the health and wellness tourism sector, further validation is needed. In this work plan step Kokua will conduct primary and secondary market research. Kokua will work closely with the HTA and its board, the HVCB and a market research firm to conduct primary research of the target market. The objective will be to gain a more detailed understanding of the demand for health and wellness travel. The team will also perform a review of existing studies and academic research on the topic of travel for the purpose of health and wellness. The results of this work plan step will be used by the HTA, HVCB and Global Advisory Services to refine the inventory of health and wellness experiences and modalities and develop the Hawaii Health and Wellness brand.

##### **Primary Consumer Research**

Kokua will work closely with the HTA, the HVCB and a market research firm to conduct quantitative research of US long-haul point-of-sale travelers. The objective of the research will be to learn about the appeal of specific sectors of health and wellness travel as well as specific health and wellness components.

##### **Secondary Consumer Research**

Kokua will survey and analyze existing research on health and wellness tourism. This will include prior studies done for the State of Hawaii as well as articles in academic journals and the resources of Global Advisory Services. Global Advisory Services will access as needed senior academicians and researchers of the Academic Consortium, including Harvard Medical School.

##### **Competitive Destination Research**

Kokua will research the health and wellness programs of a broad sample of competing destinations. Kokua will focus on the types of products or experiences they are highlighting, as well as a review of their marketing and on-line presence.

## **2. Brand Development**

In this work plan step Kokua will draw upon various sources to define the Hawaii Health and Wellness Tourism brand, in collaboration with the HTA, the HVCB and its advertising agency. Kokua will develop parameters for the brand that will provide guidance to the agencies responsible for marketing the brand.

### **Define Brand, Develop Brand Statement**

Based on the team's knowledge of the product, the findings of the primary research, the secondary research and competitive analysis and input from the HTA and HVCB, Kokua will develop a comprehensive brand statement for Hawaii's Health and Wellness Tourism product. The document will define the character and values of the brand. This document will provide a framework for all communications of the brand, so that all marketing and advertising executions are true to the agreed-upon brand.

### **Gain Stakeholder Input and Buy-in**

Kokua will present a draft of the brand statement to the HTA, HVCB and key stakeholders for review and comment. The key stakeholders will include individuals and organizations that contributed to the process in the Phase II Working Group sessions, including representatives of the Host Culture.

### **Refine Brand Statement as Appropriate**

Based on input gathered from stakeholders, Kokua will finalize the brand statement.

### **Identify Signature Element(s)**

Based on the team's knowledge of the product and understanding of the inventory items, Kokua will identify signature elements of the inventory to highlight in the marketing and advertising of the brand.

## **3. Business Development Center Planning**

In this work plan step Kokua will plan the Business Development & Incubation function for the State of Hawaii's Health & Wellness Tourism initiative. Kokua will recommend a plan for implementation, outlining a business model, funding sources and partnerships.

### **Develop Business Model**

During Phase II of the project several models for the business development function were proposed. These included various combinations of 'bricks and

mortar' and 'virtual' service centers. The Phase II business plan will recognize the need for further research and planning. During Phase III Kokua will research the feasibility of the various approaches, select one and formulate a comprehensive implementation plan. Kokua's plan will include detail to the level of physical space requirements and staffing levels. The team's work with the inventory working groups will provide us with insights into the comprehensive menu of business development services needed.

### **Identify Funding Sources**

In recognition that the Health and Wellness Tourism industry has potential benefits beyond the tourism sector into the larger state economy, Kokua will research and identify funding sources other than the HTA to develop and implement the Business Development & Incubation function. These will include State, Federal and private funding sources.

### **Academic Partnerships**

Kokua will research the feasibility of establishing partnerships with academic institutions, including the University of Hawaii System and others nationwide with which Global Advisory Services works.

### **Professional Association Partnerships**

Kokua will research the feasibility of establishing partnerships with professional associations in the healthcare and hospitality fields, including the possibility of co-locating with existing incubators or business development centers.

## **4. Education & Certification**

There was strong consensus in the Phase II Certification working group that there is a need for a process for providers in Hawaii's health and wellness tourism product to receive education in two areas: hospitality training and host culture training. Hospitality training would be geared toward providing a quality experience to visitors, while host culture education would provide accurate, authentic information about the host culture and Hawaii. It was also agreed that having a safe, ethical and credible product will enhance Hawaii's health and wellness tourism brand, and help differentiate us from competing destinations. Such a process was defined as certification. A number of different models for certification were proposed during the working group sessions. In Phase III, the team will move forward developing the education component while further exploring the various models for certification proposed in Phase II.

### **Evaluate Certification Process**

Kokua will research the issue of certification. The team will attempt to identify successful relevant models already in existence, in order to gain insights into success factors and challenges of different models. Kokua will assess the costs and benefits of various models, taking into consideration such factors as cost, liability and consumer preferences. Based on this, the team will make clear recommendations for implementing a plan.

### **Identify Education Partners**

One of the areas of consensus in the Phase II working groups was that some form of hospitality industry training is an appropriate component of any Health and Wellness Tourism vetting process. The team will identify partners who can fulfill the education components of the process.

### **Host Culture Liaison**

Another area of broad consensus in the Phase II working groups was that host culture education should be a component of the process. As such, Kokua will be bringing a host culture representative from the Phase II working groups, Ramsay Taum of the Native Hawaiian Hospitality Association, on as the team's host culture Liaison in Phase III.

## **5. Cultivate Inventory**

In this work plan step the team will continue the process of defining and classifying the product inventory that was started in the Phase II working groups.

### **Major Inventory Sector Working Groups**

The team will convene and facilitate working group sessions focusing on major inventory sectors. The working groups will further refine the product inventory matrix that was developed during Phase II of this project. These inventory sector working groups would also interface with topics such as business development and certification.

### **Prioritize Inventory for Marketing & Business Development**

Kokua will also work with the inventory sector working groups to prioritize inventory items for the purposes of marketing and business development. The team will develop criteria by which to evaluate individual inventory items in order to prioritize them. Along with the primary consumer research findings, this would assist in the identification of signature inventory items for marketing.

### **Finalize Inventory**

Based on the results of the inventory sector working groups and the prioritization analysis, the team will finalize the inventory of products and services that will be employed in moving the project forward.

## **6. Web-based Tool**

Kokua will work with a website developer to produce a web-based tool supporting various aspects of the project. The intent here is not to simply create another Hawaii health and wellness tourism inventory website as several already exist. Kokua envisions a web-based tool that will support the inventory cultivation and business development & incubation functions. During Phase III, the web-based tool will be the virtual centerpiece of the project, providing access to participants and allowing for close collaboration among people contributing to different elements of the project. It will tie together the Inventory Cultivation, Business Development and Certification efforts. It may later evolve into a promotional vehicle for Hawaii health and wellness tourism that includes a customer feedback mechanism.

### **Inventory**

The team will work with a website vendor to create a tool to support the product inventory cultivation process. The product inventory matrix developed during Phase II will form the basis for this, along with the capability for registered users (working group, project team and key stakeholders) to provide input online. This will facilitate the inventory product prioritization function.

### **Incubation**

The web tool will also be used in the incubation process, to allow project participants to provide input regarding the inventory items requiring incubation or business development services, and the types of services that are needed.

## **7. Strategic Alliances & Packaging**

In this work plan step the team will network with organizations in the government, healthcare and tourism sectors regarding the development of Hawaii's Health and Wellness Tourism product. To date, the project has involved only the HTA, DBEDT and Global Advisory Services. As the project moves forward, however, additional partners will be brought on to fund and implement the plan. Other partnerships on the sales side will also need to be forged.

### **Network and Identify Partners**

This is an activity that started during Phase II and will continue and expand during Phase III. Kokua will seek project partners in the areas of funding, housing the business development/incubation function, education and certification.

### **Develop Alliances and Packages**

The team will also network with potential partners in the travel packaging and distribution areas. These will include traditional travel industry firms such as travel agencies, but also specialty firms such as educational travel firms.

## **8. Special Events/MCI Market**

One of the findings of Phase II was that special events relating to health and wellness have potential for attracting large numbers of visitors to Hawaii, and for raising awareness of Hawaii as a health and wellness destination. In Phase III Kokua will develop tie-ins with existing events to further develop this segment of the market. The team will work closely with event planners and the sales staff of the Hawai'i Convention Center in identifying relevant events and developing tie-ins.

### **Network and Identify Existing Events**

Kokua will identify existing events that contribute to Hawaii's health and wellness tourism product, such as the Honolulu Marathon. The team will identify events that represent a cross section of inventory experiences and represent each of the counties.

### **Propose Event Tie-ins**

Kokua will identify opportunities to create tie-ins with existing events in order to increase their scope or scale. Using the Honolulu Marathon example, this could include the addition of pre- and post-race events related to health and wellness aspects of running or fitness.

### **H&W Tourism CME Tie-ins**

Similarly, the team would work with existing CME (Continuing Medical Education) events to identify opportunities to enhance Hawaii's position as a health and wellness destination.

### ***Phase Four – Implementation***

As envisioned, Phase Four will be the implementation of the plans finalized in Phase Three.

- Marketing roll-out
- Pilot business development projects
- Establish Business Development Center
- Finalize educational curriculum
- Develop alliances and sales partnerships
- Develop special event tie-ins

### ***Phase Five – Ongoing Operations***

Phase Five will be the activities related to overseeing Hawaii's Health and Wellness Tourism product.

- Monitor ongoing research and customer feedback
- Refine brand statement and consult with marketing and advertising vendors
- Oversee Business Development Center
- Oversee provider education/certification
- Manage alliances and sales partnerships
- Manage relationships with special events

## VIII. Financial Summary

### ***Prior Contracts***

This report and business plan represents the culmination of Phase II of the project. The Hawaii Tourism Authority has funded both phases of the project as follows:

- Phase I – Vision and Strategy: \$5,000
- Phase II – Buy-in and Business Plan: \$50,000

### ***Financing Sought***

For Phase III – Launch Kokua requires \$185,000 in funding from HTA.

### ***Use of Proceeds***

The funds for Phase III – Launch would be allocated as follows:

1. Speaking With Customers	\$40,000
2. Brand Development	15,000
3. Business Development Center Planning	40,000
4. Education & Certification	19,500
5. Cultivate Inventory	30,000
6. Web-based Tool	20,000
7. Strategic Alliances & Packaging	9,500
8. Special Events/MCI Market	<u>\$11,000</u>
Total	<u>\$185,000</u>

**IX. Appendices**

***Biographies of Key Participants***

***Invitation to Join Working Groups***

***Working Group Meeting Agendas and Summaries***

***Draft Product Inventory Matrix***

***April 29, 2004 “Healing in Paradise” Introduction Letter***

***April 29, 2004 "Healing in Paradise" Meeting Agenda and Summary***

***April 29, 2004 "Healing in Paradise" PowerPoint Presentation***