

The logo for Hawai'i Tourism Japan features the words "HAWAII TOURISM" in a white, sans-serif font. A horizontal line with a color gradient from red to blue passes behind the text. Below this line, the word "JAPAN" is written in a smaller, white, sans-serif font.

HAWAII TOURISM

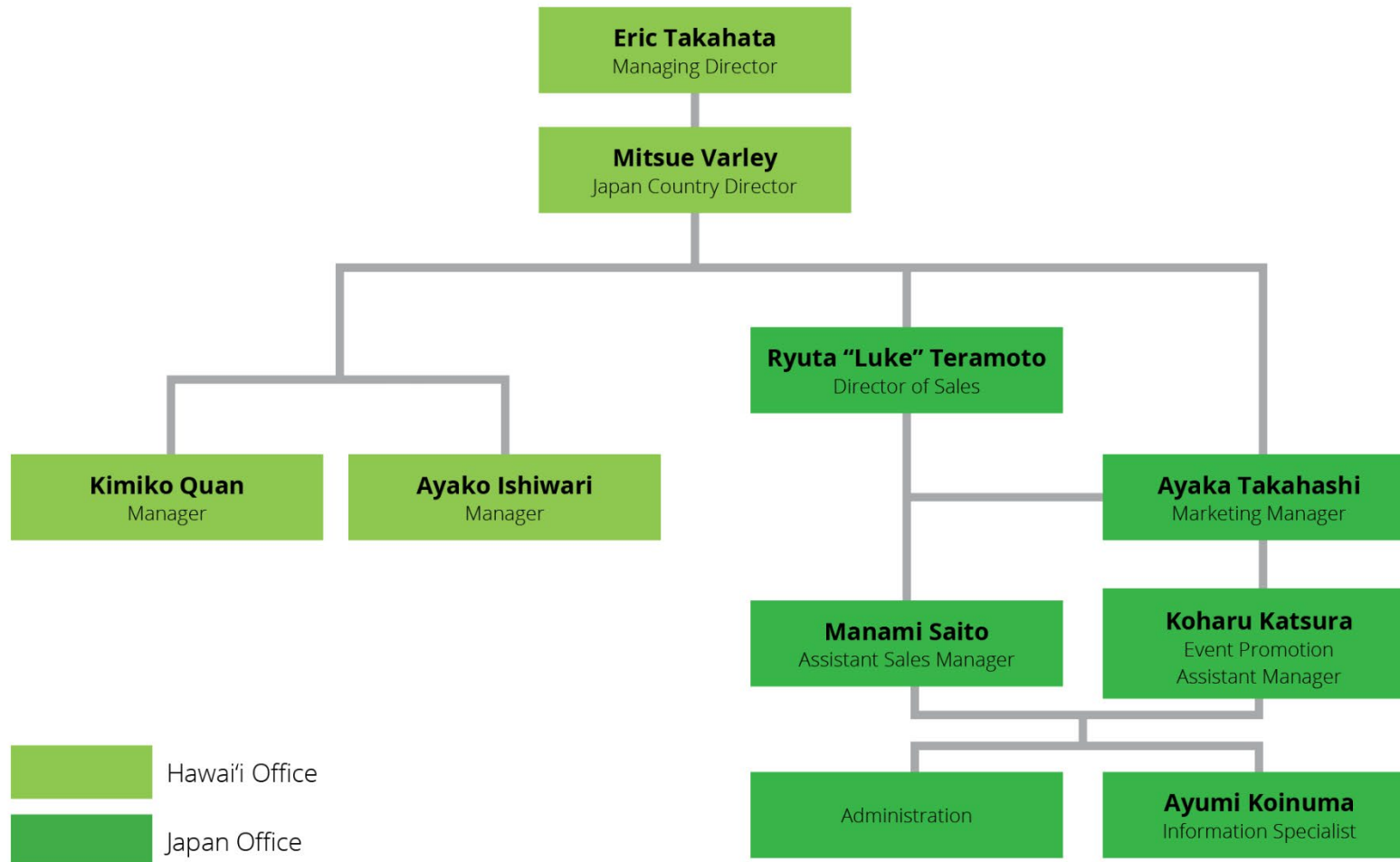
JAPAN

**2023 Brand Marketing Plan (BMP)
&
Destination Management Support Plan (DMSP)**

**HTA Tourism Conference
12.9.2022**

**Eric Takahata
Managing Director**

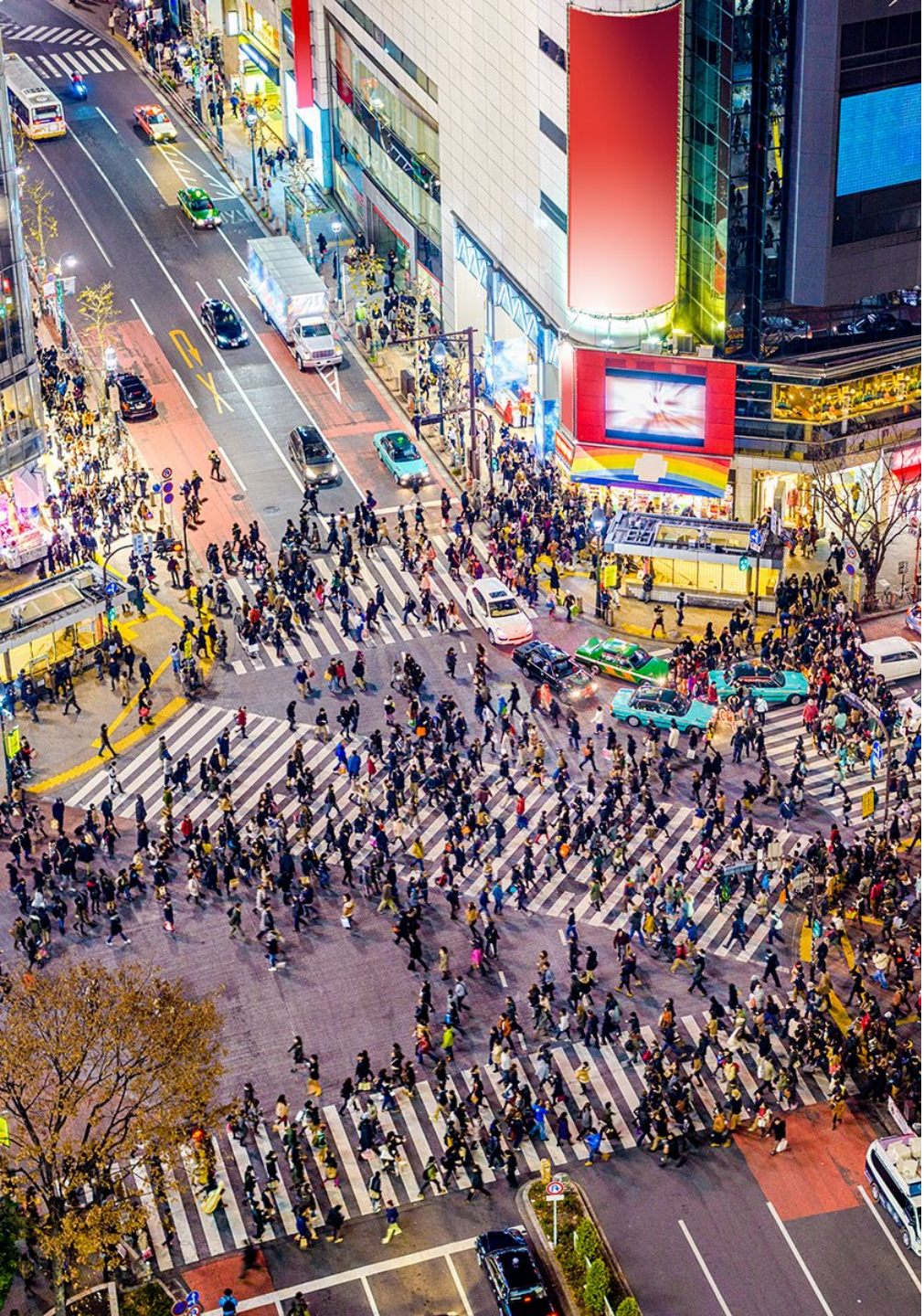
HAWAII TOURISM JAPAN TEAM





2023 Brand Marketing Plan

MARKET SITUATION



GENERAL ECONOMY

- Japan's economic decline in Q3. GDP fell 1.2% (annualized)
- Weak yen and rising inflation
- Government stimulus package to drive modest recovery
- Positive growth expected for Q4

OUTBOUND TRAVEL

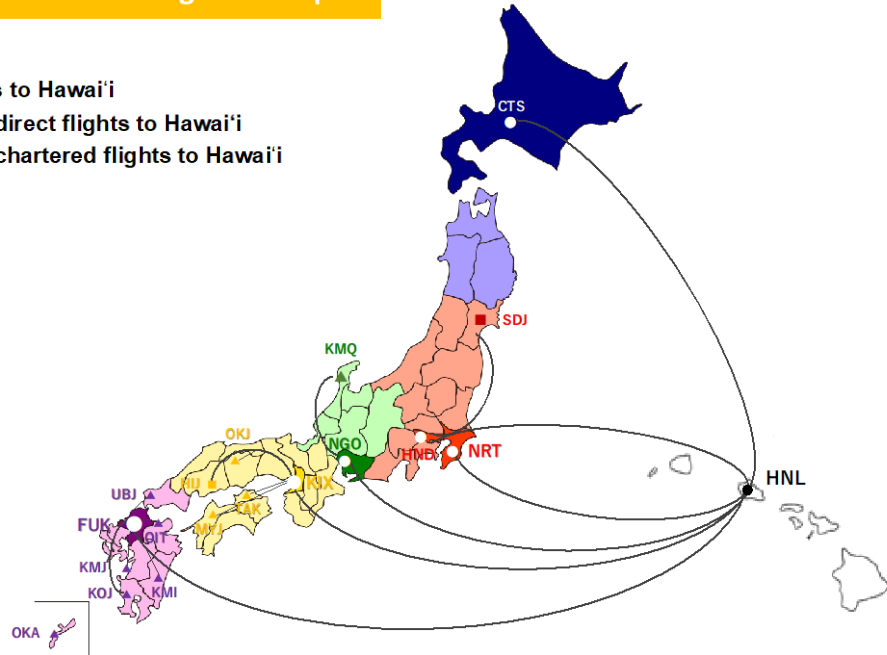
- Japan's borders reopened to foreign visitors in October 2022
- Return of inbound foreigner to stimulate Japan's economy
- Outbound recovery to follow
- Domestic travel promotion by Japanese government



GENERAL TRAVEL SENTIMENT

- Japan is adapting to life with the virus despite infection spikes
- Vaccination program accelerated by Japan government
- Hawai'i remains top destination of choice

- Direct flights to Hawai'i
- Suspended direct flights to Hawai'i
- ▲ Suspended chartered flights to Hawai'i



AIR SEAT SYNOPSIS

Top 5 % Share by Area (2019)

Kanto/Narita/Haneda	50.9%
Kinki/Kansai	16.1%
Chubu/Nagoya	16.0%
Kyushu/Fukuoka	5.3%
Tohoku	4.2%

	Airlift			Air seat		
	2022	2019	% change	2022	2019	% change
22-Nov	248	596	-58%	65,238	161,036	-59%
22-Dec	303	644	-53%	80,959	173,443	-53%
23-Jan	320	696	-54%	85,667	174,100	-51%
Total	871	1936	-55%	231,864	508,579	-54%

COMPETITIVE LANDSCAPE



Short Haul Destinations

- South Korea
- Taiwan
- Singapore



Long Haul Destinations

- Europe
- Canada
- Australia

TARGET AUDIENCE

TARGET AUDIENCE



**Affluent
Traveler**



**Romantic
Couples**



**Experience
Seekers**



**Ethical
Younger
Generation**



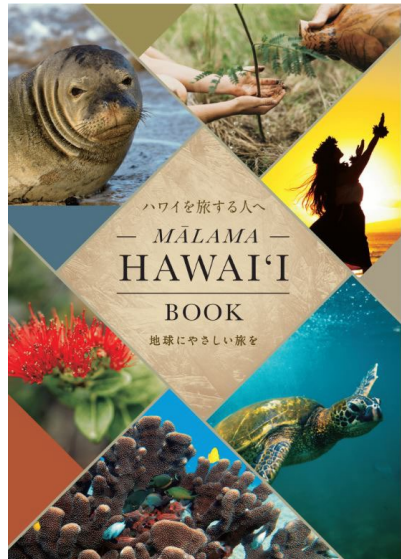
**Multi
Generation
Family**

Target regions with direct flights to Hawai'i, annual household income of \$75,000+ and over \$1 million in assets

2023 BMP STRATEGY

HAWAI'I CORE BRAND MESSAGING

Position Mālama Hawai'i as the catalyst for change in our state's regenerative tourism approach





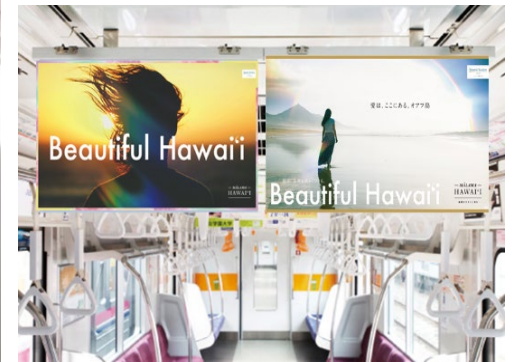
BMP STRATEGY

- Accelerate immediate recovery efforts by regaining direct flight access and implementing targeted promotions to build travel momentum
- Showcase Hawai'i's brand appeal over competing destinations
- Promote regenerative tourism growth on all islands
- Cultivate mindful travelers as sustainability ambassadors for Hawai'i
- Drive multi-island visitations

KEY CAMPAIGNS/PROGRAMS

MĀLAMA HAWAI'I CAMPAIGN

Elevate Hawai'i's brand positioning by inspiring the mālama concept to keep the Hawaiian Islands top of mind while improving sentiment for travel abroad. HTJ will place digital, SNS, taxi ads, and out-of-home advertisement.



HAWAI'I EXPO

Collaborate with stakeholders to create an authentic Hawai'i experience in the Japan market.

2023 GOAL

14K

Consumers

55

Travel Trade
Partners



PRIVATE SECTOR COLLABORATION

Partner with well-known nationwide companies to draw on the power of their consumer data and drive the Mālama Hawai'i messaging to broad audiences across Japan.



ロッテから
ハワイ州観光局公認商品登場！



JAPAN SUMMIT

Invite key travel agencies and provide opportunity for local industry stakeholders to meet in person to develop travel products. HTJ will conduct educational seminars and cultural workshops.



JAPAN MISSION

Provide networking and relationship building opportunities for Island Chapters and local suppliers with key industry partners and stakeholders in the Japan market. HTJ will organize B to B seminars, workshops and roadshows.



2023 DESTINATION MANAGEMENT SUPPORT PLAN



DMSP STRATEGY

- Expand pre- and post-arrival education at events, satellite offices and through travel partners and lounges
- Collaborate with Island Chapters on DMAP implementation efforts by developing experiences, products and educational resources
- Promote positive visitor impacts to improve resident sentiment
- Connect local residents with visitors from Japan through a shared values approach to strengthen the relationship between the two regions

KEY CAMPAIGNS/PROGRAMS



**ALOHA
PROGRAM**

ALOHA PROGRAM

Focus on providing hands-on experiences through various workshops and FAM tours. Train the trainer curriculum will be created to support Japanese docent program and develop products that offer authentic and deeper experiences.



HŌKŪLE‘A PROJECT

Drive educational programs to position Hawai‘i as a learning destination, while raising interest in SDGs initiatives in Japan. HTJ will develop seminars and workshops in conjunction with Japanese Hōkūle‘a crew and connect schools and organizations to develop future exchange programs.



LEVERAGING SISTER CITY RELATIONSHIPS

HTJ will support efforts of State of Hawai'i and county offices as they continue to reinforce their established relationships with sister cities across Japan.

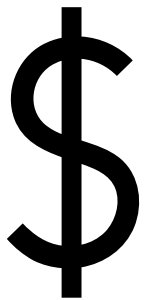


KEY PERFORMANCE INDICATORS

KEY PERFORMANCE INDICATORS



- Grow average daily visitor spending
- Grow total visitor expenditures
- Recover visitor arrivals
- Increase number of multi-island visitors and average islands visited
- Increase visitors awareness on safe and responsible travel and Mālama Hawai'i



PARTNERSHIP OPPORTUNITIES

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ACTIVITY	DATE	DESCRIPTION	LOCATION	COST
TRADE SHOWS				
Japan Summit	April	Provide opportunity for stakeholders and travel agents to accelerate tourism recovery and create new tour products through Mālama Hawai'i initiatives	O'ahu	In Kind
Hawai'i Seminar & Mahalo Reception	Mid-November	Provide latest information to travel agents and strengthen relationship with stakeholders; develop new Mālama Hawai'i and regenerative tourism related products	Tokyo Osaka Online	In Kind
Japan Mission	Mid-November	Share Hawai'i updates including DMAP initiatives and progress by island; boost development of new travel products for each island	Tokyo	Information
TRADE FAMILIARIZATION TRIPS (FAMS)				
HIS MOU Mālama Hawai'i FAM (with airlines and HIS)	February	Educate HIS Hawai'i Trainer on Mālama Hawai'i and experience regenerative tourism related activities to develop new products for spring and Golden Week	O'ahu, Maui	In Kind
Collaboration Edu-tourism FAM (with airlines)	March	FAM tour for school representatives to learn how Hawai'i is the ideal destination for Edu-tourism by experiencing voluntourism activities	O'ahu	In Kind
Japan Summit Mālama Hawai'i FAM(planning staffs, in-store sales staffs, travel trade media)	April	FAM tour for key industry partners to experience unique activities under the Mālama Hawai'i initiative and connect with NPOs to develop new tour products	O'ahu	In Kind
Romance FAM	April	FAM tour for wedding planners/production companies to showcase ideal venues and activities to develop new tour products for couples and families	O'ahu	In Kind
Satellite Office (leisure)	October	FAM tour for leisure group to experience unique Mālama Hawai'i activities, boost booking pace and conduct B to C seminars at Satellite Office locations	O'ahu Island of Hawai'i	In Kind
On Island Mālama Hawai'i FAM Activity Support	January to June	Support FAM tour organized by major wholesalers (HIS, JTB, JALPAK) to experience Mālama Hawai'i to deepen understanding and develop new tour products	Hawai'i (Islands: TBD)	Information
TRAVEL TRADE EDUCATION				
Educational Seminar Blitz	January, June, September	Collaborate with Hawai'i Promotion Committee Japan (HPCJ) to conduct trade educational seminars in target cities on regenerative tourism while sharing the latest updates	Fukuoka Tokyo Nagoya Osaka Sapporo	Information
Hawai'i Trainer Program	Throughout the year	Advance JTB / HIS Hawai'i Specialists to trainer status to develop in-house curriculum on Mālama Hawai'i initiatives and develop new tour products	Japan / Hawai'i	Information
Webinar	Throughout the year	Provide latest Hawai'i updates to travel agents and sales staff, build strong relationship with stakeholders and develop new products	Online	Complimentary

PARTNERSHIP OPPORTUNITIES

ACTIVITY	DATE	DESCRIPTION	LOCATION	COST
CONSUMER PROMOTIONS				
Konin (Certified) Program	Spring-Summer	HTJ's certified program with Japan corporations to amplify Hawai'i's brand to reach the general public	Japan	In Kind
Influencer Collaboration	April - October	Leverage influencer's reach to increase awareness of mālama mindset	Hawaiian Islands	In Kind / Information
SNS Promotion Campaign	Throughout the year	Share the latest Hawai'i information and educate Japanese consumers to be Pono Travelers	Online	Information
Hawai'i-made Promotion	Throughout the year	Expand awareness of Hawai'i-made products in the Japan market by conducting campaigns	Online	In Kind / Information
Allhawaii.jp	Throughout the year	Share information from industry partners and stakeholders on Hawai'i news and updates with direct consumers	Online	Information
Mālama Hawai'i Website	Throughout the year	Information on Mālama Hawai'i initiatives to educate visitors to be Pono Travelers and expand the awareness of regenerative tourism in the Japan market	Online	Information
Aloha Program	Throughout the year	Educational information on Hawaiian history, culture, music, Mālama Hawai'i initiatives, etc. for Hawai'i fans in Japan	Online	In Kind/ Information
E-Mail Magazine Distribution	Throughout the year	Monthly E-mail magazine for general consumers, travel trade members, and Aloha Program members	Online	Information
CONSUMER SHOWS				
Hawai'i Expo	May	Annual event that attracts both first timers and repeaters to Hawai'i including neighbor islands through Mālama Hawai'i initiatives	Tokyo	In Kind / Information
Event Endorsement	Throughout the year	Educate the Mālama Hawai'i concept to event organizers in Japan and offer brochures and materials to select Hawai'i events across Japan	Japan	Information

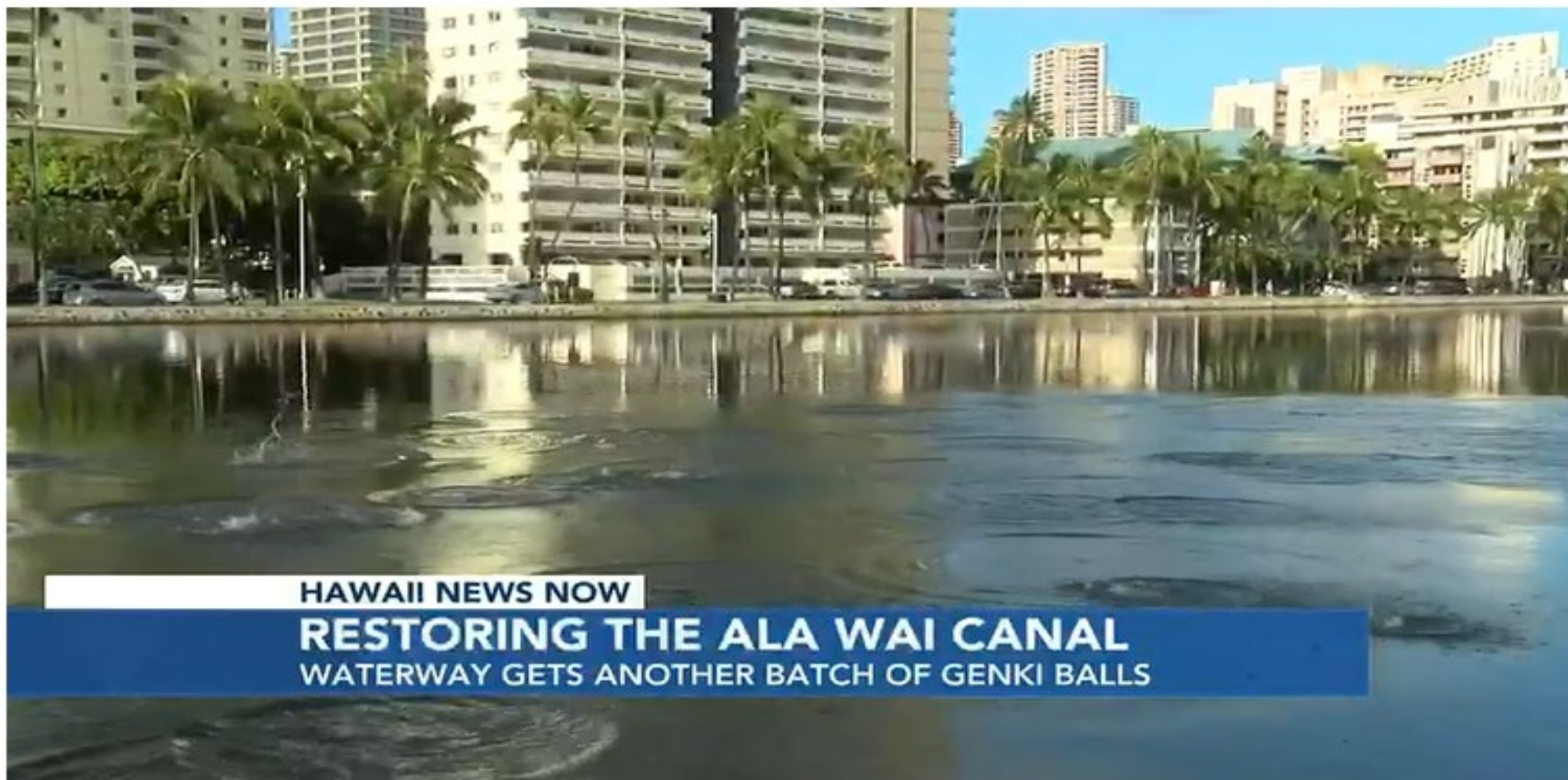
Contact Mitsue Varley at Hawaii@htjapan.jp



2022 MĀLAMA HAWAI‘I HIGHLIGHT



Hawaii students, Japanese visitors toss 'genki balls' into Ala Wai in effort to clean water



HAWAII NEWS NOW

RESTORING THE ALA WAI CANAL
WATERWAY GETS ANOTHER BATCH OF GENKI BALLS

Typically, you shouldn't throw things in the Ala Wai Canal. But there are exceptions — especially when it involves cleaning the water.

A close-up photograph of a person's hands holding a traditional Hawaiian lei made of braided green leaves. The lei is held diagonally across the frame. The background is a soft, out-of-focus green, suggesting a tropical setting. The text "MAHALO NUI LOA!" is overlaid in white, bold, sans-serif capital letters in the center of the image.

MAHALO NUI LOA!

HAWAII TOURISM
JAPAN