

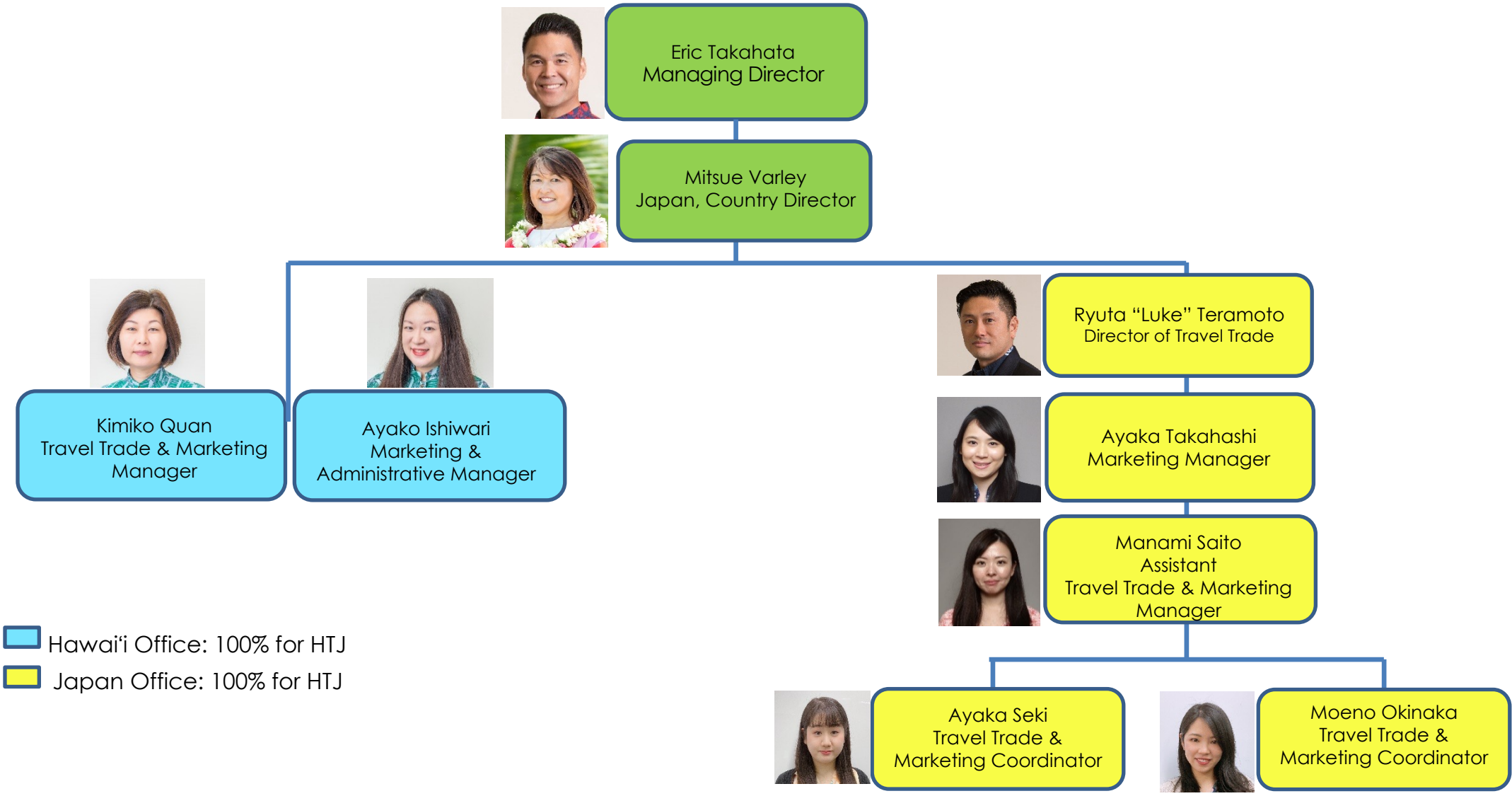


# **2022 BMMP**

## **HTA Winter Tourism Update 2.9.2022**

Eric Takahata  
Managing Director

# HAWAI'I TOURISM JAPAN



A large, stylized sunburst or flower-like graphic in the top left corner, composed of many thin, radiating lines and larger, rounded petals in a light orange color.

# MARKET SITUATION

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# MARKET SITUATION

**Economy:** Japan's real gross domestic product in 2021 October-December is estimated to have grown 1.4% from the previous quarter on average

**Omicron variant:** Japan continues to suspend entry of overseas travelers due to Omicron variant, reduced to 7-days quarantine

## Japan travel industry optimistic for spring recovery

- Japan's vaccination rate 78.9% (completed, as of 2/8), the government sees more booster shot demand from Japanese nationals
- **U.S. CDC Japan level 4 travel advisory**
- Government plans to revive domestic and international travel in the new year
- ANA, JAL, HA and ZIPAIR continue to invest in Hawai'i as a top priority destination (JAL: 9 flights per week starting Feb 2022)

	January 2021	February 2022	March 2022
Total Flights	79	76	74
Total Air Seats	19,826	17,979	17,646



# MARKET SITUATION

## Competing Destinations

**Guam**



**Thailand**



**Singapore**



**Europe**



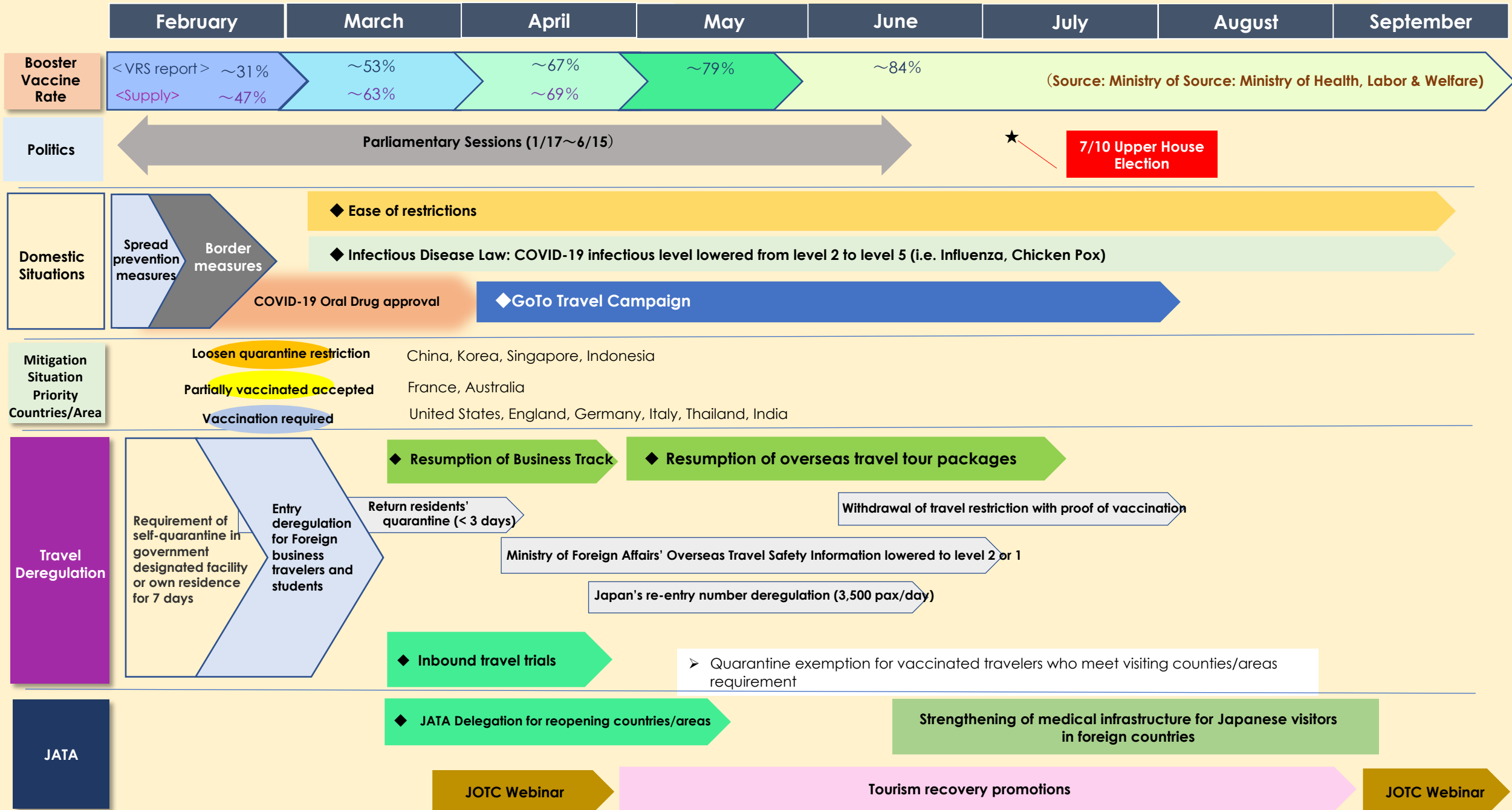
**Canada**



**Australia**



# JATA Roadmap for Outbound Travel Resumption (As of 2/2, 2022)



A large, stylized graphic of an orange slice, composed of several segments radiating from a central point, is positioned in the upper left corner of the slide.

# TARGET AUDIENCE

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# TARGET AUDIENCE

## Target Regions

Japan by Region	2019 Japan Visitors Arrivals	% Share by Area	Population	# of Passport Holders
Kanto	800,191	51.00%	42,995,000	11,680,090
Kinki	252,268	16.10%	22,541,000	5,326,649
Chubu	250,320	16.00%	21,460,000	4,211,497
Kyushu	82,609	5.30%	13,016,000	2,114,749
Tohoku	65,295	4.20%	8,983,000	974,116
Chugoku	52,534	3.40%	7,438,000	1,118,987
Hokkaido	31,310	2.00%	5,382,000	722,965
Shikoku	24,523	1.60%	3,845,000	498,131
Okinawa	8,779	0.60%	1,434,000	282,881
TOTAL	1,567,829	-	127,094,000	26,930,065

## Household income

- Single income over \$75,000
- Dual income over \$100,000



Repeater, Hawai'i lovers, property owners, hula communities



New norm workers, entrepreneurs, investors, influencers in their 30s and 40s



Romance, wedding, honeymooners



Family

40% would like to visit Hawai'i soon after being able to travel  
(November, 2021 N = 14,595)



# 2022 STRATEGY

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# CORE BRANDING MESSAGE



Humans, nature, the earth,  
A compassionate heart, a loving heart.  
A word that symbolizes the spirit of Hawai'i.  
Mālama

When the world is wrapped with the  
kindness of Mālama, it will become even  
more beautiful.

— *MĀLAMA* —  
**HAWAI'I**

地球にやさしい旅を

To nurture our planet

# RECOVERY

- Keeping the momentum and being flexible under current market conditions
- Mālama Hawai'i message distribution and efforts to increase booking pace
- Support Travel Industry with Co-op
- Continuation of focus industry education through Mālama Hawai'i initiatives

# STRATEGY

## CONSUMER

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

## PUBLIC RELATIONS

Launch "Mālama Hawai'i Media 100 Project" and Enhance media center website with Mālama Hawai'i content and latest updates, doubling media access

## TRAVEL TRADE

Focus on top 8 wholesalers and 5 OTAs, partner with 4 major airlines and educational outreach leveraging JATA partners



### JATA



### Wholesalers



### OTAs



### Major Airlines

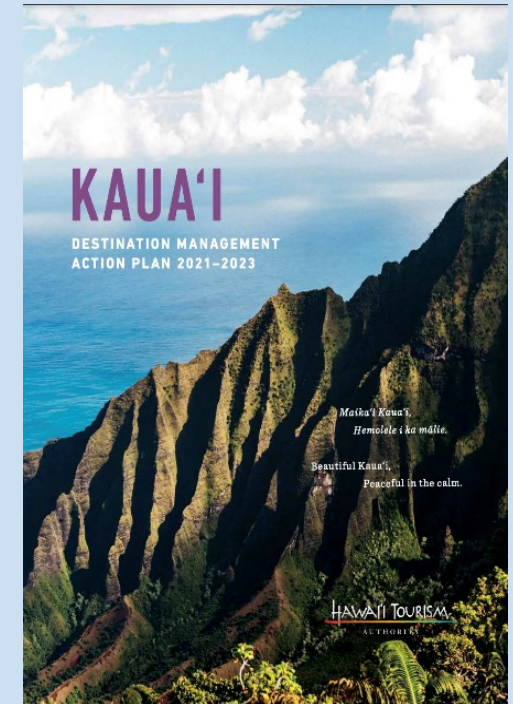
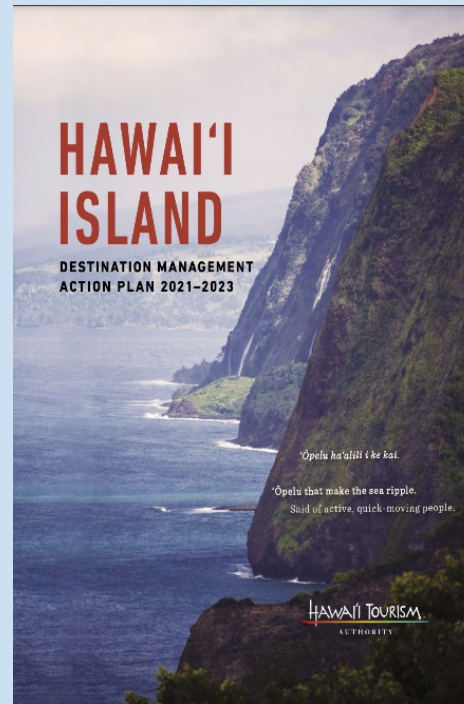
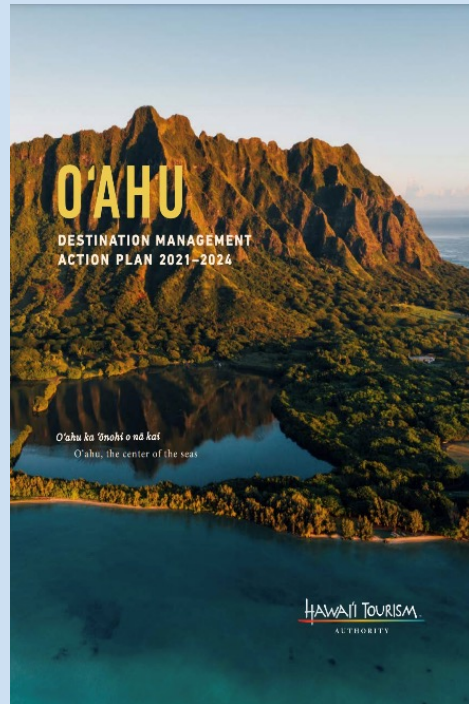




# DMAP

## Destination Management and Regenerative Tourism

- Capitalize on growing SDG interest across Japan to raise awareness of Mālama Hawai'i and the state's Aloha+ Challenge initiatives
- HTJ to orchestrate coordination of its owned media, events, satellite offices and partners on branding initiatives and DMAP for each island



# KEY CAMPAIGNS/PROGRAMS

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# MĀLAMA HAWAI'I CAMPAIGN

## Advertising Campaign

Promote Mālama Hawai'i and Pono Traveler initiatives through Advertising campaign in targeting major cities



Digital



Print Advertisement



Newspaper Panoramic



OOH

**Outcome:** Exposure, reach and brand positioning



# MĀLAMA HAWAI'I CAMPAIGN

Collaboration with Gakken (i.e. Scholastic)

- Create Hawai'i specific issue and reach out to youth
- Distribute to all public elementary schools nationwide: 20,300 copies



**Outcome:** Exposure, reach and brand positioning





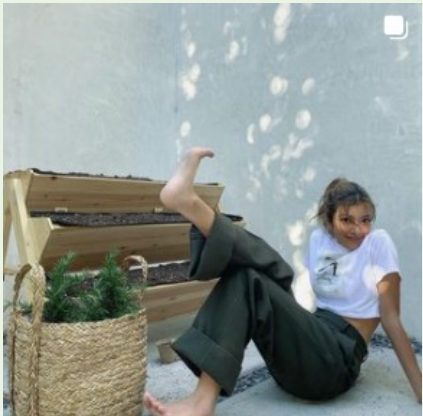
- Conduct Influencer campaigns to spread Mālama Hawai'i message
- Microsite enhancement by sharing engaging stories

# MĀLAMA HAWAI'I CAMPAIGN

## Influencer Campaign

## Microsite Enhancement

### Influencer campaign



### Mālama microsite



### Hōkūle'a microsite



**Outcome:** Exposure, reach and brand positioning

Reinforce Mālama Hawai'i messaging and CSR opportunities to expand consumer reach by collaborating with multiple major brands

# MĀLAMA HAWAI'I CAMPAIGN

Collaborative Campaign





# PUBLIC RELATIONS

- Launch “Mālama Hawai‘i Media 100 Project”
- Enhance media center website with Mālama Hawai‘i content and latest updates, doubling media access
- Reinforce Mālama Hawai‘i to promote Hawai‘i’s unique brand story on Hawaiian culture, natural beauty and the local community



**Outcome:** Exposure, reach and brand positioning

# HŌKŪLE'A PROJECT – SISTER CITY BLITZ

Support Polynesian Voyaging Society's initiative of actively inheriting the global environment and culture of each country through the screening of the documentary film, "Moananuiākea" in 10 sister cities across Japan



Tokyo	Hokkaido
Yokohama	Okinawa
Osaka	Hiroshima
Nagoya	Yamaguchi
Fukuoka	Ehime



**Outcome:** Exposure, reach, brand positioning and # of educated participants



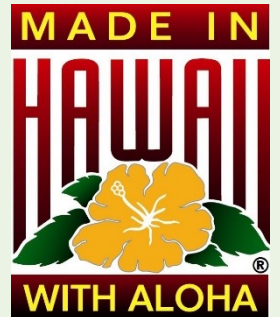
# CONSUMER EVENT MARKETING

Hawai'i EXPO & Made in Hawai'i Products Promotion

HTJ's signature Hawai'i EXPO to be amplified in 2022 with Hawai'i events in Japan that support B to B and B to C opportunities while promoting made in Hawai'i products



*Island Fresh*  
**Buy Local It Matters**  
Join the movement!



**Outcome:** Exposure, brand positioning, and # of Made in Hawai'i product feature





ALOHA  
PROGRAM

# ALOHA PROGRAM

Hawaiian Culture Program

HTJ's flagship Hawaiian culture educational platform with 63,000 members and 25,000 Hawai'i specialists serving as ambassadors of Hawai'i's regenerative tourism initiatives

## Workshop



## Field Trip

~Aloha Program Week in Hawai'i~



~MĀLAMA HONUA~  
WHAT IS HŌKŪLE'A?

## Webinar



Sustainable Coastlines Hawaii  
x  
Aloha Program  
~ Clean Beaches Start At Home ~



Let's  
learn together!  
👉

**Outcome:** Increase # of members/Hawai'i specialists, # of participants of educational events, # of new product development related to Mālama Hawai'i, and exposure to future mindful travelers





ALOHA  
PROGRAM

# ALOHA PROGRAM CONT.

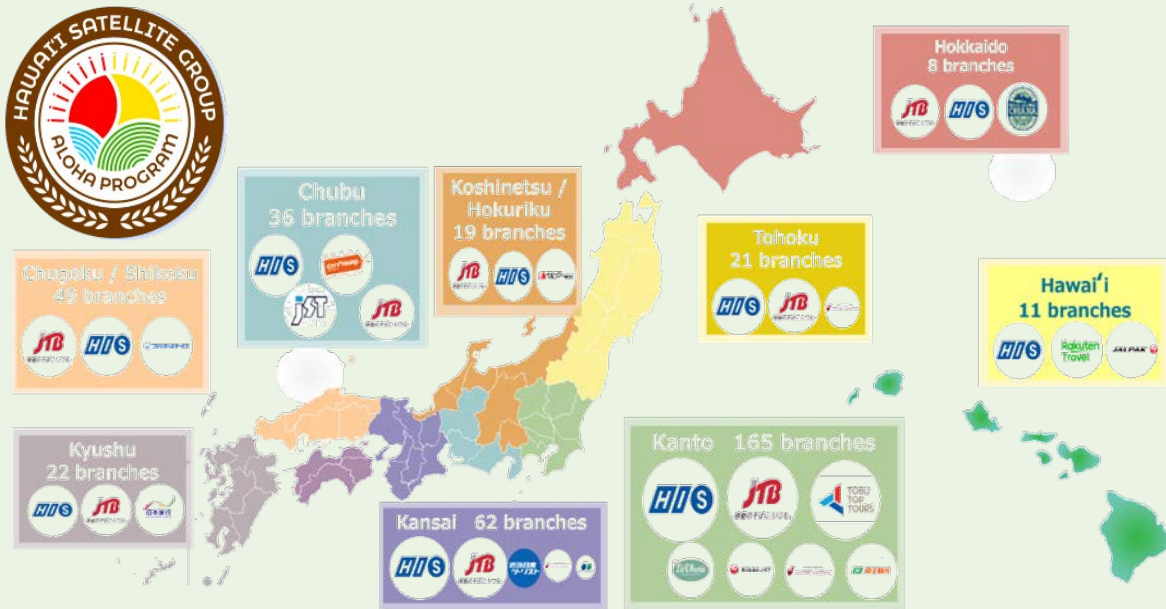
Hawaiian Culture Program

Aloha Program special projects include:

## #1: Advanced satellite office program

Satellite office: Total 393 branches

## #2: 'Ōlelo Hawai'i 10<sup>th</sup> anniversary in February 2022



**Outcome:** Increase # of members/Hawai'i specialists, # of participants of educational events, # of new product development related to Mālama Hawai'i, and exposure to future mindful travelers

# ROMANCE MARKET INITIATIVES

HTJ will collaborate with The Hawai'i Wedding Association to increase bookings in 2022 and onward. Romance events will be conducted targeting individuals in their 20s-30s.

Anniversary trips, target age range 40s - 60s

ARLUIS WEDDING BEST BRIDAL



**Outcome:** Exposure, increase future bookings, and higher expenditures

# TRAVEL TRADE

- Focus on top 8 wholesalers and 5 OTAs
- Collaborate with 5 major industry media – *Wing Travel, Travel Journal, Travel Voice, Travel Vision, Travel Watch*
- Partner with 4 major airlines
- Conduct educational outreach leveraging JATA partners
- Cross-promote with credit card companies and Hilton Grand Vacations
- Small Leisure Group - Position Hawai'i as a safe, learning destination, targeting the Romance and Education group

**Outcome:** Reach, exposure, increase future bookings, and exposure to future mindful travelers





# PERFORMANCE MEASURES

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# PERFORMANCE MEASURES

	Annual Target	Semi-Annual Targets	
	2022	Jan-Jun	Jul-Dec
<b>Consumer Paid Media Measures</b>			
TV Reach	25,824,000	12,912,000	12,912,000
Print Circulation	3,349,333	1,758,333	1,591,000
Digital Reach	17,522,876	16,682,876	840,000
Radio Reach	11,918,712	5,959,356	5,959,356
Out of Home Reach	306,071,400	131,923,922	174,147,478
TV Impressions	63,785,280	31,892,640	31,892,640
Print Impressions	11,722,666	6,154,166	5,568,500
Digital Impressions	21,027,451	20,019,451	1,008,000
Radio Impressions	29,439,219	14,719,609	14,719,609
Out of Home Impressions	367,285,680	158,308,706	208,976,974
<b>Travel Trade Paid Media Measures</b>			
Print Circulation	17,800	8,900	8,900
Digital Reach	150,000	75,000	75,000
Print Impressions	62,300	31,150	31,150
Digital Impressions	370,500	185,250	185,250
<b>Public Relations Measures</b>			
No. of Media/PR Calls	295	155	140
No. of Press Releases Issued	24	12	12
Print Publicity Value - Paid	170,000	80,000	90,000
Digital Publicity Value - Paid	120,000	60,000	60,000
Broadcast Publicity Value - Paid	120,000	60,000	60,000
Print Impressions - Paid	1,800,000	900,000	900,000
Digital Impressions - Paid	576,000,000	288,000,000	288,000,000
Broadcast Impressions - Paid	12,000,000	6,000,000	6,000,000
Print Publicity Value - Earned	960,000	480,000	480,000
Digital Publicity Value - Earned	9,000,000	4,500,000	4,500,000
Broadcast Publicity Value - Earned	284,000,000	84,000,000	200,000,000
Print Impressions - Earned	3,150,000	1,550,000	1,600,000
Digital Impressions - Earned	576,000,000	288,000,000	288,000,000
Broadcast Impressions - Earned	284,000,000	74,000,000	210,000,000
No. of Individual Press Trips	4	2	2
No of Articles Generated from Individual Press Trips	8	4	4
<b>Consumer Shows</b>			
No. of Shows	13	7	6
Show Attendance	753,750	502,000	251,750

	Annual Target	Semi-Annual Targets	
	2022	Jan-Jun	Jul-Dec
<b>Travel Trade</b>			
No. of Meetings with Travel Trade Partners	586	293	293
No. of Travel Trade Partners Met With	1,492	750	742
No. of Trade Shows	4	2	2
Trade Show Attendance	320	160	160
No. of Trade Show Appointments	120	60	60
No. of Travel Trade FAMs	5	3	2
No. of Travel Trade FAM Participants	65	35	30
No. of Trade Education Sessions	28	18	10
No. of Trade Education Participants	2,800	1,800	1,000
No. of Agents Completed Training Program	4,600	2,400	2,200
<b>Social Media Metrics</b>			
<b>FACEBOOK</b>			
Total Impressions Gained	3,600,000	1,800,000	1,800,000
Total Interactions Gained	180,000	90,000	90,000
Total Fan Count	119,220	119,100	119,220
Increase in Fans	240	120	120
Total Posts	216	108	108
<b>INSTAGRAM</b>			
Total Impressions Gained	6,520,000	3,260,000	3,260,000
Total Interactions Gained	288,000	144,000	144,000
Total Fan Count	1,916,500	932,500	984,000
Increase in Fans	16,000	8,500	7,500
Total Posts	334	166	168
<b>DMAP Measures</b>			
No. of DMAP Action Items Supported	96	48	48
No. of Initiatives to Promote Hawai'i Made Products	48	24	24
No. of Hawai'i Festivals & Events Promoted	120	54	66
No. of Voluntourism Programs Promoted	36	18	18
<b>allhawaii</b>			
Page View	6,440,000	3,120,000	3,320,000
Unique Users	2,390,000	1,170,000	1,220,000
Number of Page Session	14,510,000	6,510,000	8,000,000
Page per Session	2.5	2.5	2.5
Average session duration	2:00	2:00	2:00
<b>Aloha Program</b>			
Page View	2,570,000	1,280,000	1,290,000
Unique Users	534,000	262,000	272,000
Number of Page Session	743,000	371,000	372,000
Page per Session	3.63	3.68	3.57
Average session duration	4:56	4:30	4:83



# PARTNERSHIP OPPORTUNITIES

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# PARTNERSHIP OPPORTUNITIES

## 2022 BMMP Partnership Opportunities - JAPAN

ACTIVITY	DATE	DESCRIPTION	LOCATION	COST
<b>TRADE SHOWS</b>				
Hawai'i Online Travel Showcase	March/November	Updating the latest information for travel agents and strengthen the relationship with stakeholders. Encourage to develop new products	Online	Complimentary
Japan Summit	June	Along with Mālama Hawai'i initiatives, provide opportunities for stakeholders and travel agents not only tourism recovery, but also creating new tour products	Hawai'i (O'ahu)	In Kind
JATA Tourism Expo Japan	September 22-25	Largest travel event in Asia. Through the event, Mālama Hawai'i initiatives and Pono Travelers concept will diffuse to direct consumers. JATA will be arrange B2B session for stakeholders and travel agents during the event.	Tokyo	TBA
<b>TRADE FAMILIARIZATION TRIPS (FAMS)</b>				
Japan Summit FAM (Planning staffs, TT media, Edu tourism)	April	FAM tour to showcase current Hawai'i for Tourism recovery and planning for Shimoki (Oct 2022 to March 2023) and 2023 tour products	Hawai'i (Oahu)	In Kind
Satellite office (Romance/leisure)	December	FAM tour to provide unique experiences and activities with the concept of Mālama Hawai'i and encourage the participants to create new tour products.	Hawai'i (Islands: TBD)	In Kind
Aloha Program Satellite office	June/October	FAM tour to provide unique experiences and activities with the concept of Mālama Hawai'i and encourage the participants to create new tour products.	Hawai'i (O'ahu & Island of Hawai'i)	In Kind
Collaboration FAM (With airlines)	May/June/November	Conduct FAM tour with airline partners	Hawai'i (Island: TBD)	In Kind

## PUBLIC RELATIONS

Media education webinar	March/June/October	Information offering, story pitch for Japanese media and educate with Mālama Hawai'i concepts.	Online	Information
Media Assistance	Throughout a year	Information offering, story pitch, media relation	Online	In Kind / Information
Media Event	TBD	Media event to connect with stakeholders and media in Japan to increase the exposure and showcase new/unique experiences.	Tokyo	TBA
Press Tour	April-November	Conduct individually or in small groups of writers/editors	Hawai'i (Island: TBD)	In Kind
Travel Trade media meeting	Quarterly	Travel trade media interviews/meeting to increase Hawaii's media exposures	Japan & Online	Information
Mālama Hawai'i Initiatives	Throughout a year	Information offering to Media about Mālama Hawai'i initiatives, encouraging visitors to be Pono traveler, and introducing local community and stakeholders' initiatives	Online	Information
E-Mail Magazine distribution	Throughout a year	Monthly E-mail Magazine for travel trade and media members	Online	Information

## TRAVEL TRADE EDUCATION

Virtual Site inspection video creation	January-June	Virtual site inspection by stakeholders (hotels, attractions, shopping center, etc.) to provide education opportunities for travel agents to create new products.	Online	Complimentary (limited availability)
Educational Seminar Blitz	May June July August September October	Conduct trade educational seminar in target cities.	Yokohama Nagoya Tokyo Chigasaki Hokkaido Osaka Nagaoka Hiroshima Yamaguchi Fukuoka Okinawa	TBA
Hawai'i Trainer Program	September-December	Educate Hawai'i Specialist staffs to become Hawai'i trainer for enhancing in-house education based on Mālama Hawai'i initiatives	Japan / Hawai'i	Information
Webinar	Throughout a year	Updating the latest information for travel agents, especially sales staffs about Hawai'i and support to build strong relationship with stakeholders and develop new products.	Online	Complimentary

# PARTNERSHIP OPPORTUNITIES

Contact information

[hawaii@htjapan.jp](mailto:hawaii@htjapan.jp)

CONSUMER PROMOTIONS				
Konin (Certified) Program	Spring-Summer	HTJ's certified program with Japan corporation to present Hawai'i to reach general public	TBA	In Kind
Allhawaii.jp	Throughout a year	Information offering by stakeholders to showcase Hawai'i's news and updates to direct consumers	Online	Information
Mālama Hawai'i Website	Throughout a year	Information offering to Japanese visitors about Mālama Hawai'i concepts and Mālama Hawai'i initiatives to educate visitors to be Pono Travelers and expand the awareness of regenerative tourism.	Online	Information
Aloha Program	Throughout a year	Information offering to Japanese Hawai'i fans to learn about the authentic Hawai'i from various angles; Hawaiian history, culture, music, Mālama Hawai'i initiatives, etc.	Online	In Kind/ Information
E-Mail Magazine distribution	Throughout a year	Monthly E-mail Magazine for general consumers, travel trade members, and Aloha Program members	Online	Information
SNS promotion campaign	Throughout a year	Sharing the latest Hawai'i information and educate Japanese consumers to be Pono Travelers.	Online	Information
CONSUMER SHOWS				
Hōkūle'a Blitz	May June July August September October	MOANANUIĀKEA documentary movie showing blitz includes talk show and seminars held in at sister cities.	Yokohama Nagoya Tokyo Hokkaido Osaka Nagaoka Hiroshima Yamaguchi Fukuoka Okinawa	In Kind Information
Hawai'i Expo Collaboration Events	May - October	Collaborate with major Hawai'i events in Japan to attract first-timers to Hawai'i and neighbor islands distributions.	Nagoya Osaka Tokyo Hiroshima Fukuoka Sapporo	In Kind Information
JATA Tourism Expo Japan	Sep 22-25	Largest travel events in Asia. Through the event, Mālama Hawai'i initiatives and Pono Travelers concept will diffuse to direct consumers.	Tokyo	TBA

**MAHALO!**  
ありがとうございました！



HAWAII TOURISM  
JAPAN